

**Research Note 2004-08**

**Development of Recruiter Assessment Measures  
for the U.S. Army**

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Technical Review by

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# Foreword

The Department of the Army and the United States Army Recruiting Command (USAREC) must recruit approximately 115,000 highly qualified young people each year for the Regular Army and the Army Reserve. To accomplish this, USAREC selects, and trains nearly 2,500 new recruiters each year from among the Army's best Soldiers. The recruiting job is challenging and stressful, and new personnel management tools are required to optimally select and train recruiters who may best sell the Army to the most highly qualified prospects. In response, the U.S. Army Research Institute for the Behavioral and Social Sciences initiated a research program to investigate new approaches for the selection and training of recruiters. The work was carried out under contract with Personnel Decisions Research Institutes, Inc.

This report describes the important performance requirements of the Army recruiter job and provides a review of assessment and training practices in the current Army Recruiter Course (ARC), as well as applicable practices in the private sector. It reviews several areas of strength and opportunities for improvement in the ARC. In addition, the report describes how a research foundation for an integrated ARC assessment system may be developed at the Recruiting and Retention School. Finally, three products were developed to assist USAREC in their efforts to develop tools for the training and development of recruiters, the Army Recruiter Performance Rating Scales, a Situational Judgment Test (SJT), and a recruiter in-basket simulation exercise.

PDRI briefed the preliminary results to the Commandant of the Recruiting and Retention School on October 26, 2000.

While these products are immediately useful for USAREC, in addition, the methods used to develop them may be applicable in selecting, training, and developing highly skilled Soldiers throughout the Army.



STEPHEN L. GOLDBERG  
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# Executive Summary

## Research Requirements

The U.S. Army Research Institute for the Behavioral and Social Sciences was tasked with examining the Recruiting and Retention School (RRS) curriculum and offering recommendations, as necessary, to ensure that graduates of the Army Recruiter Course (ARC) are well prepared for the recruiting environment and are as effective as possible in the recruiter job. Personnel Decisions Research Institutes, Inc. was contracted to help with this project.

This research focused on five tasks to accomplish these goals. First, we identified the important performance requirements of the Army recruiter job and produced behavioral rating scales for evaluating recruiter performance. The second task was to develop a comprehensive recruiter assessment and development concept for the ARC. The third task was to develop a new Situational Judgment Test for recruiter assessment. The fourth task was to build upon existing measures at the school by developing a new role-play/simulation exercise that may be used in the ARC as part of this comprehensive assessment system. The final task was to develop the research foundation for an integrated ARC assessment system validated against subsequent performance on the job.

## Results

The purpose of the first task was to identify the important performance requirements of the Army recruiter job and produce behavioral rating scales for evaluating recruiter performance. The behavior-based rating scales for Army recruiters were developed by integrating current Army recruiter performance information with previous Army recruiter scale development results.

To develop the new scales, we first conducted rating scale revision workshops to determine the appropriateness of previously developed (Borman, Russell, & Skilling, 1987) categories for evaluating the performance of current Army recruiters. In addition, workshop participants identified where changes to the behavioral definitions of the original categories might be necessary. Second, we revised the scales, as necessary, and finally, our staff conducted retranslation workshops to assess the adequacy of the newly revised Army recruiter performance scales in capturing the recruiter performance domain.

This resulted in a set of final updated Army Recruiter Performance Rating Scales which include the following eight dimensions: (1) Locating and Contacting Qualified Prospects; (2) Gaining and Maintaining Rapport; (3) Obtaining Information from Prospects and Making Good Person-Army Fits (revised dimension); (4) Salesmanship Skills; (5) DEP/DTP Maintenance (new

dimension); (6) Establishing and Maintaining Good Relationships in the Community; (7) Organizing Skills/Time Management (revised dimension); and (8) Supporting Other Recruiters and USAREC.

The Army Recruiter Performance Rating Scales are ready for use as performance criterion measures in recruiter research. Both supervisor and peer evaluations of individual recruiters' performance, using the scales, should result in reasonably accurate measures of these recruiters' performance.

The second task consisted of a critical review of the current assessment practices used by the Army Recruiter Course program. To conduct this analysis, we spent time at the school observing the assessment exercises and reviewing the curriculum material. As a result of this work, we identified several areas of strength and opportunities for improvement.

Specific strengths included the following:

- Exercises used by the school to assess recruiter trainee performance closely resemble the material taught in the classroom, and the types of situations they are likely to face on the job.
- Assessors are very skilled at acting out the roles required for each exercise. This acting ability adds to the overall realism of the exercises, allowing students to fully experience the recruiter role.
- There is relatively little subjectivity in assessors' evaluations of the students, making their ratings quite reliable. Also, this type of evaluation process makes the expectations for students very clear.

Our only suggestions for improvement involve more standardization of the role-plays and evaluating the effectiveness of students' performance in exercises as well as whether they accomplished each process step. We suggested possible assessor training techniques that might be helpful in implementing these changes.

In addition to the review of ARC assessment processes, a survey of private-sector training practices and goal-setting was conducted to provide some guidance for improvements in recruiter training and development. More specifically, practices that appear most useful for applications in the Army recruiting environment include: (1) realistic job previews for new recruiters and, as appropriate, their families; (2) experiential learning, including simulations, role-plays, and feedback from experienced peers; (3) experiences with different versions of a task (e.g., working with different types of prospects and parents); (4) experiences involving rejection (but with follow-up peer or supervisor support); (5) continuing OJT after the ARC experience; (6) as much as possible, individualized development plans for recruiters new to the field; and (7) difficult, challenging, but attainable goals for individual recruiters and teams (e.g., stations).

The third task was to develop a new Situational Judgment Test (SJT) for recruiter assessment. The notion here was that a recruiter SJT would provide RRS with a

means to introduce their students to many of the challenges they will face as recruiters without the time and expense associated with developing a large

number of highly detailed simulations. The SJT provides instructors with a tool to enable an assessment of their students' ability to respond in the recruiting environment and a vehicle for coaching and providing feedback about the appropriate actions to take in a variety of recruiting situations.

Development of the 25-item SJT involved four major steps: (1) generating realistic, job-related situations; (2) developing a variety of responses for each situation; (3) obtaining ratings of the effectiveness of each response; and (4) creating an answer key for the SJT items. We worked closely with experienced Army recruiters at every step of the SJT development process to ensure that the situations and the responses were realistic and challenging.

The fourth task was to build upon existing measures at the school by developing a new role-play/simulation exercise that may be used in the ARC as part of this comprehensive assessment system. Our task here was to identify important elements of the recruiter job that may be underrepresented in the current array of simulation exercises.

A needs analysis of the school curriculum indicated that an in-basket exercise might be a useful simulation to incorporate into the current simulation exercises. To develop the in-basket, we began with an existing in-basket that was originally developed for an Army recruiter assessment center (see Borman, 1979). Using items from this exercise, we developed an initial version of the in-basket. Then, through a series of workshops, we extensively revised the in-basket, creating a new 20-item exercise that measures behaviors related to planning and time management, practical judgment, and teamwork skills.

We also developed an instructor debrief and student self-assessment guide. To help instructors facilitate these debrief meetings, an instructor leader's guide was developed. The purpose of this guide was to provide instructors with the information and materials needed to facilitate the debrief meeting.

The final task of the research project was to develop the research foundation for an integrated ARC assessment system validated against subsequent performance on the job. Based on our discussions with ARC instructors, it appears that training performance data on individual students is electronically maintained to a degree, but a more comprehensive database of student performance information would provide a foundation for future research on the ARC. Such a database might be used in the future to evaluate new recruiter selection procedures regarding their validity for predicting performance in training or to evaluate the effects of new training interventions on student performance. It might also be useful to examine how closely student performance in training relates to production and job performance in the field.

## **Use of Results**

The work conducted for this research project resulted in three products that can be used immediately by USAREC, the Army-Recruiter Rating Scales, the Army-Recruiter Situational Judgment Test, and the ARC in-basket exercise. The Rating Scales are available online for use by USAREC as a performance criterion measure and are a key component of a recruiter performance feedback process being developed at the RRS. In addition, based on a review of ARC assessment practices and private-sector training practices, several recommendations were made to improve the ARC program as well as post-training recruiter training and development. Finally, the review and recommendations for an integrated ARC assessment system are critical to support future recruiter selection, training, and development programs.

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# Table of Contents

<b>Introduction .....</b>	<b>1</b>
<b>Revision of the Army Recruiter Performance Rating Scales.....</b>	<b>2</b>
Scale Revision Workshops.....	3
Scale Retranslation Workshops .....	3
<b>Review of Current Assessment Practices .....</b>	<b>6</b>
<b>A Selective Review of Sales Training and Related Interventions in the Civilian Sector.....</b>	<b>8</b>
<b>Development of an Army Recruiter Situational Judgment Test.....</b>	<b>11</b>
Overview.....	11
Generating Situations.....	12
Generating Response Options .....	13
Obtaining Response Option Effectiveness Levels.....	14
Conducting the Pilot Test and Creating an Answer Key.....	16
Implementing the SJT at the Recruiting and Retention School.....	18
<b>Development of a New Simulation Exercise.....</b>	<b>20</b>
Needs Analysis.....	20
In-basket Item development .....	22
Development of an In-Basket Scoring Guide.....	22
Final Revisions .....	23
<b>Development of an ARC Database for Future Research.....</b>	<b>24</b>
<b>References .....</b>	<b>27</b>

## List of Tables

<b>Table 1. Demographics of Recruiters in Scale Retranslation Workshop.....</b>	<b>4</b>
<b>Table 2. Results from the Recruiter Scale Retranslation Workshop.....</b>	<b>4</b>
<b>Table 3. Characteristics of Participants in Situation Generation Workshop ....</b>	<b>12</b>

Table 4. Characteristics of Participants in SJT Response Option Generation Workshop .....	13
Table 5. Characteristics of Participants in Effectiveness Level Workshops.....	14
Table 6. Characteristics of Participants in pilot tests.....	17
Table 7. Role Play Exercise Coverage of Recruiter Performance Categories ....	21

## List of Appendices

Appendix A — Original Army Recruiter Performance Rating Scales.....	A-1
Appendix B — Instructions for Scale Retranslation Workshop.....	B-1
Appendix C — Updated Army Recruiter Performance Rating Scales.....	C-1
Appendix D — Situational Judgment Test Situation Generation Workshop Instructions .....	D-1
Appendix E — Situational Judgment Test Response Generation Workshop Instructions .....	E-1
Appendix F — Situational Judgment Test Response Option Rating Workshop Instructions .....	F-1
Appendix G — Situational Judgment Test Pilot Test Instructions.....	G-1
Appendix H — In Basket Overview.....	H-1
Appendix I — In-Basket Administrator Instructions .....	I-1
Appendix J — In-Basket Exercise .....	J-1
Appendix K — In-Basket Exercise Facilitators Guide.....	K-1



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# Introduction

The Department of the Army (DA) and the United States Army Recruiting Command (USAREC) must recruit approximately 115,000 highly qualified young people each year for the Regular Army and the Army Reserve. A decade of economic growth and expansion, changes in educational aspirations among parents and their children, and negative perceptions of military life are only a few of the reasons why this has become an increasingly difficult task. To help accomplish these goals, the DA and USAREC identifies, selects, and trains nearly 2,500 new recruiters each year from among the Army's best Soldiers. These recruiters receive extensive training and work long hours in an increasingly difficult and stressful job.

To help address this problem, the U.S. Army Research Institute for the Behavioral and Social Sciences (ARI) has been tasked with examining the Recruiting and Retention School (RRS) curriculum and making improvements, as necessary, to ensure that graduates of the Army Recruiter Course (ARC) are well prepared for the recruiting environment and are as effective as possible in the recruiter job. Personnel Decisions Research Institutes, Inc. (PDRI) was contracted to help with this project.

PDRI was asked to complete five tasks. First, we were to identify the important performance requirements of the Army recruiter job and produce behavioral rating scales for evaluating recruiter performance. The second task was to develop a comprehensive recruiter assessment and development concept for the ARC. The third task was to develop a new Situational Judgment Test (SJT) for recruiter assessment. The fourth task was to build upon existing measures at the school by developing a new role-play/simulation exercise that may be used in the ARC as part of this comprehensive assessment system. The final task was to develop the research foundation for an integrated ARC assessment system validated against subsequent performance on the job.

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# Revision of the Army Recruiter Performance Rating Scales

Over the last 25 years, PDRI has been involved in projects to develop behavioral rating scales for military recruiters in the Army, Navy, and Marine Corps (e.g., Borman, Hough, & Dunnette, 1976; Borman, Toquam, & Rosse, 1978; Borman, Rosse, & Rose, 1982; Borman, Russell, & Skilling, 1986). The original effort to develop behavior-based rating scales for Army recruiters (Borman, Russell, & Skilling, 1986) resulted in eight performance categories: (1) Locating and Contacting Qualified Prospects; (2) Gaining and Maintaining Rapport; (3) Obtaining Information from Prospects and Determining Their Needs and Interests; (4) Sales Skills; (5) Establishing and Maintaining Good Relationships in the Community; (6) Providing Knowledgeable and Accurate Information About the Army; (7) Organizing Skills; and (8) Supporting Other Recruiters and USAREC.

The first four dimensions describe the selling sequence, and represent the core dimensions of the recruitment process. The last four categories are also important, reflecting additional areas of the job critical for the overall effectiveness of an Army recruiter and the success of the recruiting mission. Within each performance category, statements describing the behaviors that exemplify extremely effective, effective, marginal, and ineffective performance anchor these four effectiveness levels on the scales. The original Army recruiter version of these scales appears in Appendix A.

The idea in the present research effort was to use the original Army scales as a starting point in developing a description of the current recruiter performance requirements and an updated version of the rating scales. Thus, our approach was intended to provide behavior-based rating scales for Army recruiters by integrating current Army recruiter performance information with previous Army recruiter scale development results.

To develop the new scales, we first conducted rating scale revision workshops to determine the appropriateness of the original Army recruiter categories for evaluating the performance of current Army recruiters and also to identify where changes to the behavioral definitions of the original categories might be necessary. Second, we revised the scales, as necessary, and finally, our staff conducted retranslation workshops to assess the adequacy of the newly revised Army recruiter performance scales in capturing the recruiter performance domain.

## **Scale Revision Workshops**

To begin the process of updating the original rating scales, we conducted in-depth interviews with four ARC instructors at the Recruiting and Retention School (RRS) at Fort Jackson, South Carolina. Instructors from the ARC were used as subject-matter experts (SMEs) because they are chosen from among the top recruiters in the field and, therefore, have a thorough understanding of the necessary performance requirements of the recruiter job.

Each instructor was given a copy of the original Army rating scales and asked to determine whether the existing performance categories were still relevant for the current recruiter job, and also to identify terminology differences between the existing scales and current practice. The instructors agreed that the existing categories were, in general, relevant for current recruiter performance.

However, the instructors did suggest some revisions to the categories. The first major change involved the Obtaining Information from Prospects and Determining Their Needs and Interests category which was combined with sections of Providing Knowledgeable and Accurate Information About the Army to form Obtaining Information from Prospects and Making Good Person-Army Fits. Additionally, Organizing Skills was changed to Organizing Skills/Time Management to reflect the importance of time management tools, such as the recruiter planning guide, in recruiters' daily activities. Finally, a new category was created. DEP/DTP Maintenance captures the Army's increasing focus on sustaining relationships with new recruits through the delayed entrance process. For each of the new and revised categories, new summary statements were written to reflect the relevant content.

We also decided to collapse the three behavioral statements for each performance effectiveness level within a category into a single summary statement that describes performance at that level. This was done to reduce the amount of reading time for raters using the scales. We believe the shorter statements retain the essence of the longer behavioral statements. The final updated Army Recruiter Performance Rating Scales include the following eight dimensions: (1) Locating and Contacting Qualified Prospects; (2) Gaining and Maintaining Rapport; (3) Obtaining Information from Prospects and Making Good Person-Army Fits (revised dimension); (4) Salesmanship Skills; (5) DEP/DTP Maintenance (new dimension); (6) Establishing and Maintaining Good Relationships in the Community; (7) Organizing Skills/Time Management (revised dimension); and (8) Supporting Other Recruiters and USAREC.

## **Scale Retranslation Workshops**

In order to test the adequacy of the new performance category structure and behavioral statements, we conducted a workshop with a separate group of ARC instructors. Demographic information for the instructors is listed in Table 1. We asked the 31 instructors to sort the behavioral statements into the eight

performance categories and to rate each statement's level of effectiveness on a 1-4 scale, where 4 = very effective; 3 = effective; 2 = needs some improvement; and 1 = needs considerable improvement.

**Table 1. Demographics of Recruiters in Scale Retranslation Workshop**

<b>Time in Army</b>	<b>N</b>	<b>Time in Recruiting</b>	<b>N</b>
Less than 10 Years	1	Less than 5 years	1
10 to less than 14 years	7	5 years to less than 7 years	8
14 to less than 17 years	11	7 years to less than 10 years	14
17 to less than 20 years	11	10 years to less than 13 years	6
20 years or more	1	13 years or more	2
<b>Race</b>	<b>N</b>	<b>Pay Grade</b>	<b>N</b>
African-American/Black	13	E7	28
White/Caucasian	9	E8	3
Hispanic/Latino/Mexican-American	2	<b>Gender</b>	<b>N</b>
Asian-American/Pacific Islander	1	Male	28
Other	6	Female	3

The instructions for the workshop appear in Appendix B. As is typically done in retranslation, the mean and standard deviation of the effectiveness rating was computed for each behavioral statement, along with the percentage of instructors sorting each statement into each category. These data appear in Table 2. To summarize, across the 32 behavioral statements and 31 instructors, 93.9% of the time instructors sorted the statements into the intended category *and* rated at the intended effectiveness level. In every case but one, the effectiveness level was within one scale point of the intended level. However, for four of the behavioral statements, there was sufficient disagreement in the effectiveness level, and in two cases the category, to warrant revisions to the statements. This was done with the intention of clarifying the effectiveness level or the category membership. The final Army recruiter behavioral rating scales appear in Appendix C.

**Table 2. Results from the Recruiter Scale Retranslation Workshop**

<b>Summary Statement</b>	<b>Percent of Recruiters Placing it in Correct Category</b>	<b>Mean Effectiveness Rating</b>	<b>Standard Deviation of Effectiveness Rating</b>
A1	93	1.07	0.26
A2	93	2.07	0.26
A3	93	3.00	0
A4	93	4.00	0
B1	100	1.00	0
B2	80	2.00	0
B3	100	2.93	0.26
B4	93	4.00	0

**Table 2. Results from the Recruiter Scale Retranslation Workshop (continued)**

Summary Statement	Percent of Recruiters Placing it in Correct Category	Mean Effectiveness Rating	Standard Deviation of Effectiveness Rating
C1	93	1.00	0
C2	93	2.00	0
C3	87	3.07	0.26
C4	87	3.87	0.52
D1	100	1.00	0
D2	100	1.93	0.26
D3	100	3.00	0
D4	93	3.93	0.26
E1	100	1.00	0
E2	100	1.87	0.35
E3	100	3.13	0.35
E4	100	3.80	0.41
F1	100	1.00	0
F2	100	2.00	0
F3	100	3.00	0
F4	100	4.00	0
G1	100	1.00	0
G2	100	2.00	0
G3	100	3.00	0
G4	100	4.00	0
H1	100	1.00	0
H2	100	1.93	0.26
H3	100	3.07	0.26
H4	100	3.93	0.26

*Note:* A = Locating And Contacting Qualified Prospects; B = Gaining And Maintaining Rapport; C = Obtaining Information From Prospects And Making Good Person-Army Fits; D = Salesmanship Skills; E = DEP/DTP Maintenance; F = Establishing And Maintaining Good Relationships In The Community; G = Organizing Skills/Time Management; and H = Supporting Other Recruiters And USAREC. The performance categories and all of the behavioral summary statements appear in Appendix C.

These behavioral rating scales are ready for use as performance criterion measures in recruiter research. Both supervisor and peer evaluations of individual recruiters' performance, using the scales, should result in reasonably accurate measures of these recruiters' performance on all important performance requirements of the job. These ratings scales have also been made available online and are a key component of a recruiter performance feedback process being developed at the RRS.

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# Review of Current Assessment Practices

We conducted a critical review of the current assessment practices used by the Army Recruiter Course (ARC) program. To conduct this analysis, we spent time at the school observing the assessment exercises and reviewing the curriculum material. As a result of this work, we identified several areas of strength and opportunities for improvement.

First, regarding strengths, it appears that the exercises used by the school to assess recruiter trainee performance closely resemble the material taught in the classroom. Currently, the school incorporates the "needs-satisfaction" approach to selling (Chonko, Madden, Tanner, & Davis, 1991). This approach requires the recruiter to first identify prospects, and then work to determine each prospect's dominant buying motive. After the prospect's dominant buying motive has been identified, the recruiter is taught to satisfy that motive by describing the Army's features and benefits that relate to that motive. The current role-play exercises are effective in that they train students to use this approach to selling. For example, in the sales presentation interview, students are required to identify a prospect's dominant buying motive by asking probing questions, and then sell the Army based on that motive. This approach to training allows students to practice the content learned in the classroom in situations that closely resemble the types of situations they are likely to face on the job.

Another strength of the current process relates to the assessors' role-playing. After observing multiple assessors conducting the exercises, it became apparent that the assessors are very skilled at acting out the roles required for each exercise. This acting ability adds to the overall realism of the exercises, allowing students to fully experience the recruiter role.

The only potential problem we saw with the assessors' role-playing was that the standardization of these roles was somewhat inconsistent. For example, during the telephone-prospecting interview, some assessors played the role in a highly confrontational manner, whereas others were more easy-going and agreeable. To some extent, this was effective in that it allowed students to experience a wide range of interactions; however, this is undesirable in that the exercises were not equally difficult for different students. Thus, when evaluating students, some may be subjected to a more difficult standard than others. In light of this, we recommend that the school conduct an initial and perhaps periodic assessor "role calibration" sessions.

These sessions could be conducted in a variety of ways. One way would be to develop an assessor training video. The video might show experienced assessors

conducting each exercise with a role-playing student. From this, assessors should gain a better understanding of how to play each role in a more standardized fashion. Additionally, after assessors have studied the training videos, they might spend time observing experienced assessors conducting the exercises, as well as practice playing the roles. Then, they could conduct each exercise under the supervision of an experienced recruiter to ensure that they are ready to conduct the exercises themselves.

We also reviewed the assessment evaluation process. From this review, it became apparent that students are mainly evaluated by how well they adhere to the "needs-satisfaction" approach to selling. For example, in order for a student to pass the sales interview exercise, he/she must ask a prescribed set of questions. If these questions are not asked, the student must re-take the exercise. A positive feature of this approach is that it is quite easy for an assessor to evaluate a student's performance - there is a prescribed sales process, and if a student adheres to this process, he or she passes the role-play. Thus, there is relatively little subjectivity in assessors' evaluations, making their ratings quite reliable. Also, this type of evaluation process makes the expectations for students very clear. Students know exactly what they need to do to pass each exercise.

On the other hand, this evaluation system has disadvantages. Because students are evaluated in such a mechanical fashion, the information collected from the scoring forms does not provide a description of a student's effectiveness in executing the process steps. Instead, the scoring forms merely indicate whether or not a student followed the prescribed sales process. Thus, one recommendation would be to expand the scoring forms so assessors could provide a richer description of each student's strengths and weaknesses. Rather than rating students go or no-go, assessors might use, for example, a 5-point scale to evaluate how effectively students perform in the exercises, *in addition to* whether they completed all of the steps in the prescribed process.

Finally, if rating scales are adopted to evaluate the effectiveness of students' exercise performance, we recommend a rating calibration training session for new assessors. What we have found successful in previous projects is to develop videotapes of role-playing students in the exercises, performing at different pre-set effectiveness levels. Instructors training these new assessors are provided with the intended effectiveness levels and the rationale for those levels. This training provides a common frame of reference for the new assessors and helps to calibrate their evaluations of student performance.

In sum, we saw many positive features of the ARC program. It is obvious that considerable thought and a lot of focused work went into designing the curriculum and the training techniques employed. Our only suggestions involve more standardization of the role-plays and evaluating the effectiveness of students' performance in exercises as well as whether they accomplished each process step. We provided possible assessor training techniques that might be helpful in implementing these changes.



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# A Selective Review of Sales Training and Related Interventions in the Civilian Sector

As discussed in the preceding section, the ARC, in many ways, provides a solid preparation for Non-Commissioned Officers (NCOs) entering the recruiting field. Similarly, there are certainly positive features of the on-the-job training program. This section briefly reviews a survey of training practices and goal-setting, mostly in corporate settings, conducted to provide some guidance for improvements in recruiter training and job performance.

Realistic job previews (Laurent, 2000; Strickler, 2000) constitute a possible intervention to help new recruiters adjust to the recruiting environment. Our best-practices review also suggested that active, experiential learning is a valuable asset to both initial and on-the-job training (OJT). Such practices as simulations, role-plays, videotaped feedback, and the shadowing of experienced peers are likely to be beneficial.

Regarding learning principles applied to recruiter training, first, distributed learning is probably most useful. Relatively small doses of observing, practicing skills in an area, and then moving on to new material should be more effective than mass learning of material before getting an opportunity to practice. Insurance agents, for example, are frequently trained in a new skill one day per week. They are then instructed to practice that new skill for the next four days and come back to the next training class prepared to discuss both their positive and negative experiences in the field (Laurent, 2000).

Another learning principal that can be helpful for recruiter training is reduced feedback frequency (i.e., not providing feedback after every practice attempt) and variable practice (i.e., experience with several versions of a task rather than only a single version). Evidence suggests that feedback after every attempt and constant (i.e., single version) practice may improve performance during intensive training, but that longer term transfer-of-training to the job suffers with these training practices (Ghodsian, Bjork, & Benjamin, 1997).

Practice with real examples and with real people, especially with respect to experiencing rejection, is also an important component of most sales training programs. It is difficult to simulate rejection experiences, and yet responding constructively to such experiences is very important for success in sales. Stockbroker trainees, for example, may be required to begin calling prospective clients their first day on the job in order to have experience with people who will respond negatively to them. They are normally required to continue calling



clients on a daily basis throughout their structured training program, to practice the skills they learned in that day's lesson. This type of OJT is critical to create learning and transfer-of-training in sales environments and particularly for recruiting.

These activities illustrate the notion that sales training is a long-term educational process that does not end once initial training is completed (Ray, 1999). In light of this, one of the lessons learned from our review is that the 7-week ARC is simply not sufficient to impart the selling skills necessary for success. Instead, recruiting training should be viewed as an ongoing process that continues to take place throughout a recruiter's career. Thus, we feel the recruiter OJT program should be viewed as a critical element of the sales training process.

There were several other lessons learned from our survey that may be useful for the recruiter training environment. First, sales jobs are typically highly complex, as evidenced by the relatively high compensation levels provided salespeople in the private sector. Accordingly, sales training cannot be a formulaic process, with successful sales approaches simply memorized. In fact, experts (e.g., Ray, 1999) suggest that successful salespeople learn by a combination of classroom training, on-the-job trial and error, peer observation, and coaching/feedback from sales managers. For example, Strickler (2000) reports that the college recruiters she has hired are trained using selective on-the-job observation and coaching from peer experts in specific targeted skills. Northwestern Mutual trains their insurance agents using an intensive, in-agency sales school and experiential learning on the job (Hawes, 2000; <http://www.northwesternmutual.com/sales/training-main.html>).

Ideally, new salespeople should each have a development plan tailored to their own strengths and weaknesses (Dubinsky, 1996; Freitag, 2000). This may not be feasible at ARC, but more attention might be given to individualized OJT after recruiters get to their field assignment.

Another intervention related to training is goal setting for new recruiters (and probably their more experienced counterparts). The goal setting literature strongly suggests several features of goals that enhance motivation for task performance and thus increase effort levels toward completing those tasks. First, goals should be specific rather than of the general, "do your best" type (Earley, 1985; Locke, Shaw, Saari, & Latham, 1981). Specific, challenging goals should be relatively effective in increasing motivation and subsequent job performance because of such mechanisms as more self-planning and organizing (Earley, Wojnaroski, & Prest, 1987), increased self-efficacy for task completion (i.e., self-evaluations of own competence in the targeted area — e.g., recruiting — and expectations of success, Bandura, 1997), and the setting of personal goals (Earley & Lituchy, 1991). Of course training, in addition to goal-setting, can enhance self-efficacy and lead to improved job performance.

This literature suggests that difficult, challenging quotas in the recruiting environment might be effective for improving performance related to accessions.

This is true to a point, but research also indicates that very difficult, essentially unattainable, goals have a strong negative effect on expectations of success causing self-efficacy to suffer, and thus motivation to be reduced (e.g., Chowdhury, 1993). On balance, it appears that difficult but attainable quotas should provide the best mix of personal goal setting, self-expectations, self-efficacy, motivation, and job performance.

A final issue in this section is that of incentives for performance. The motivation literature indicates that providing incentives can have both positive and negative effects. This seems to depend on the situation and the type of incentive. First, Deci and Ryan (1987) argued that organization members' control over their work environment is an important factor related to interest in the work, work motivation, and job satisfaction. Accordingly, extrinsic rewards, such as pay, can actually have a negative effect on these outcomes, particularly on intrinsic motivation, because of organization members' perceptions of reduced control over their environment. In addition, individuals who are risk-averse may find pay-for-performance plans undesirable (Cable & Judge, 1994). However, those who emphasize the negative aspects of pay rewards as motivators may have overstated the case (e.g., Eisenberger & Cameron, 1996). Certainly these effects can be minimized by actions such as accompanying rewards with praise and positive feedback or by rewarding for behaviors (e.g., effort levels, task mastery, etc.) rather than outcomes (Cameron & Pierce, 1996).

Of course, non-monetary incentives can also be effective motivators. This is fortunate for USAREC because, currently, there is no plan to institute a pay-for-performance system in the recruiting environment. Specifically, research suggests that incentives based on recognition can be quite effective (e.g., Lee, 1996). Similarly, job challenge and autonomy can prove to be excellent motivators for effective job performance.

This selective survey of the sales training and related literature, as well as information from contacts who conduct training of salespeople, provides some guidance for Army recruiter training and goal setting. Practices that appear most useful for applications in the Army recruiting environment include: (1) realistic job previews for new recruiters and, as appropriate, their families; (2) experiential learning, including simulations, role-plays, and feedback from experienced peers; (3) experiences with different versions of a task (e.g., working with different types of prospects and parents); (4) experiences involving rejection (but with follow-up peer or supervisor support); (5) continuing OJT after the ARC experience; (6) as much as possible, individualized development plans for recruiters new to the field; and (7) difficult, challenging, but attainable goals for individual recruiters and teams (e.g., stations).

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# Development of an Army Recruiter Situational Judgment Test

## Overview

As mentioned in the preceding section, simulations and realistic role-plays can be very effective tools for assessment and training purposes. However, these methods are quite time and labor intensive to both develop and administer, and the Recruiting and Retention School (RRS) has a limited amount of time to train recruiters. One alternative method, the Situational Judgement Test (SJT), has gained popularity in the private sector. The SJT presents a series of challenging but realistic situations that someone might encounter on their job. The SJT is typically a paper-and-pencil, multiple-choice test with 4-5 response options presented for each situation. The responses following each situation vary in effectiveness, and the test-taker is asked to choose the response that reflects the most effective way to deal with the situation and the response option that reflects the least effective way to deal with this situation.

The notion here was that a recruiter SJT would provide RRS with a means to introduce their students to many of the challenges they will face as recruiters without the time and expense associated with developing a large number of highly detailed simulations. The SJT would provide instructors with a tool to enable a quick assessment of their students' ability to respond in the recruiting environment and a vehicle for coaching and providing feedback about the appropriate actions to take in a variety of recruiting situations.

Accordingly, PDRI developed a 25-item SJT for Army recruiters. Development of the SJT involved four major steps: (1) generating realistic, job-related situations; (2) developing a variety of responses for each situation; (3) obtaining ratings of the effectiveness of each response; and (4) creating an answer key for the SJT items. Each of these steps is described below. We worked closely with experienced Army recruiters at every step of the SJT development process to ensure that the situations and the responses were realistic and challenging. An example item is shown below.

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You phone an applicant who received a 63 on the AFQT but she does not respond to your questions. She insists that she is not the Army type and does not have time to talk. You offer your name and number. The applicant replies that she will contact you and hangs up the phone. What should you do?

- a. Follow-up once or twice and mail her some information. If she is still not interested, code her as "NOT INTERESTED".
  - b. Annotate it in the lead resource list and leave her alone.
  - c. Follow-up until you can overcome the objection.
  - d. Contact her in 90 days to see if anything has changed. If she is still not interested, try to make her into a center of influence.
- 

## Generating Situations

The first step in the development of the SJT was the generation of situations that form the basis of the test. We conducted four situation generation workshops with a total of 34 experienced recruiters in Atlanta in January, 2001. Before the participants generated situations, PDRI workshop leaders provided detailed instructions regarding the situation format and length, as well as several sample situations. Participants were asked to generate situations based on their own observations or experiences, but we also gave them a list of general categories of possible situations (e.g., situations that require using creative techniques to locate prospects). Workshop instructions can be found in Appendix D. The characteristics of the situation generation workshop participants are shown in Table 3.

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**Table 3. Characteristics of Participants in Situation Generation Workshop**

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	N
Gender	
Male	27
Female	8
Race/Ethnicity	
African American/Black	23
Caucasian/White	11
Hispanic/Latino/Mexican American	1
Average number of years as a recruiter	5.35
Average number of years in the Army	13.30

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A total of 285 situations were generated in these workshops. Each situation was edited for clarity and grammar, and redundant situations were eliminated. PDRI staff also attempted to balance out references to male and female recruiters and male and female prospects so that both genders were represented in the situations. After the situations were edited and compiled, 204 situations remained.

## Generating Response Options

The next step in the development of the SJT was the generation of responses for the 204 situations. In February, we conducted four response option generation workshops with a total of 60 recruiters in Detroit. The 60 recruiters had, on average, 1.35 years of recruiting experience. This sample of SMEs was expected to have sufficient on-the-job experience to provide responses appropriate for the development of both effective and ineffective response options needed to build the SJT. In order to make the response option generation task manageable for the workshop participants, recruiters were asked to write responses for a subset of the 204 situations. The situations were split into five booklets of situations, and recruiters were asked to write what they would do in about 40 different situations. PRDI workshop leaders provided detailed instructions on how to write clear and concise response statements. Instructions for the response option generation workshop can be found in Appendix E. Workshop participant characteristics are shown in Table 4.

**Table 4. Characteristics of Participants in SJT Response Option Generation Workshop**

	N
Gender	
Male	55
Female	5
Race/Ethnicity	
African American/Black	21
Caucasian/White	36
Hispanic/Latino/Mexican American	3
Average number of years as a recruiter	1.35
Average number of years in the Army	12.01

There were 10 to 17 responses generated for each of the 204 situations. After the workshops, PDRI staff compiled the responses generated by the workshop participants and edited them to eliminate redundancy, enhance clarity, and reduce length. Highly obvious responses were revised or deleted. In addition, some situations were dropped due to an inadequate range of response options. After this editing process, 167 situations remained, each with between 4 and 12 response options.

## Obtaining Response Option Effectiveness Levels

In early March, we conducted a series of effectiveness level workshops in which experienced Army recruiters (experts) and Army Soldiers with no recruiting experience (novices) rated the effectiveness of each response for each situation. These effectiveness ratings provided the data necessary to: 1) select the final set of four to five response options for each item; and 2) further reduce the total number of SJT items. Thirty-seven experienced recruiters participated in the effectiveness level workshops in Houston and 40 new Soldiers participated in the effectiveness level workshops in Columbia (South Carolina). Characteristics of the workshop participants can be found in Table 5.

**Table 5. Characteristics of Participants in Effectiveness Level Workshops**

	N	
	Experienced Recruiters (experts)	New Soldiers (novices)
Gender		
Male	30	8
Female	7	32
Race/Ethnicity		
African American/Black	16	20
Asian American/Pacific Islander	0	1
Caucasian/White	9	14
Hispanic/Latino/Mexican American	11	4
Native American/Alaskan Native	0	1
Missing	1	0
Average number of years as a recruiter	3.48	0
Average number of years in the Army	12.63	.34

We collected effectiveness level information from both experienced recruiters (i.e., experts) and new Soldiers (i.e., novices) in order to select a set of items (i.e., situations) that demonstrated relatively good agreement among the experts concerning the effectiveness of each response, *but* demonstrated less agreement in the effectiveness ratings for the novices. We wanted situations where expert opinion was relatively uniform, but the best answers were not obvious in that the novice group did *not* agree as closely on the effectiveness of the responses.

There were too many situations to ask participants to rate all the responses, so we asked each participant to make ratings for a subset of the 167 situations. The situations were split into four booklets and recruiters were asked to rate the effectiveness of the responses for about 41 different situations. Participants in the workshops rated the effectiveness of each response option using a 7-point scale

in which 1 = very ineffective and 7 = very effective. In addition, workshop participants were asked to choose the response option that was most effective and the response option that was least effective for each situation. Instructions for the effectiveness level workshops can be found in Appendix F.

We first screened the workshop data to identify raters who did not appear to understand the rating task. To accomplish this, we compared each participant's ratings with the ratings provided by all the other participants in a workshop (i.e., novice ratings were compared with other novices' ratings and expert ratings were compared with other experts' ratings). Specifically, we calculated the correlation between each rater's effectiveness ratings and the ratings provided by all other raters in that workshop across all the response options. Three expert recruiters' ratings were eliminated from the experts' workshop data because their correlations across all items were less than .40. A less stringent rule was developed for the new Soldiers or novice workshop because we expected less agreement about the effectiveness levels from this group. Two new Soldiers' ratings were eliminated from subsequent analyses from the novice workshop data because their mean correlations across all the items were less than .20.

For the remaining data ( $N = 34$  experts and 38 novices), we calculated the interclass correlation coefficients (ICCs) for each item within both the expert and the novice raters to assess the interrater reliability of the ratings within each group of raters. Ideally, we wanted to choose those items where experts closely agreed about the effectiveness levels of the response options, but where novices disagreed about these effectiveness levels. The expert group's ICCs were in fact higher (mean  $ICC = .74$ ,  $sd = .31$ ) than the novice group's ICCs (mean  $ICC = .61$ ,  $sd = .43$ ).

To select the final items (i.e., situations), we first eliminated those items with expert group ICCs of less than .80, indicating that the experts did not agree very closely on the effectiveness levels of the response options. Next, we examined the mean effectiveness level ratings assigned to each response option and the percentage of raters rating each response option as most and least effective for both the expert and novice groups. Items were eliminated if they had a similar pattern of response option means or most/least effective ratings and small standard deviations for both the expert and novice groups, indicating the item was too easy, with experts and novices agreeing both within their group and across groups on the effectiveness of the response options. In addition, we discarded items that had very high response option standard deviations for both the expert and novice groups. The inference in these cases was that it was very unclear what was best (and worst) to do in these situations, even for the expert group.

Finally, we selected a set of four to five response options for each item by examining the mean and standard deviation of the effectiveness level ratings for each response option, as well as the frequency distributions of the response options selected as most effective and least effective for each item. Again, response options were selected if experts had relatively good agreement (low standard deviations) and novices had relatively poor agreement (higher standard



deviations) regarding the effectiveness level of the response option for an item. Also, we attempted to select response options that represented different effectiveness levels and were approximately equally-spaced across the effectiveness level scale. Below is an example of a "good" item that demonstrates the parameters discussed above. Notice that the experts' standard deviations are uniformly smaller than the novices', and that there is some disagreement between groups in the rank order of the effectiveness levels across the four response options.

You have some paperwork that you need to fill out by the end of the day and your Station Commander asks you to assist another recruiter with a presentation to a local school. What should you do?				
Expert		Novice		
Mean	SD	Mean	SD	Response
4.43	1.44	3.67	1.62	a. Ask the Station Commander to help you with the paperwork or find out if someone else can do the school presentation.
2.26	1.54	4.41	2.15	b. Take the paperwork with you to the presentation and complete it there.
3.96	1.15	3.19	1.49	c. Assist the recruiter with the presentation and ask the Station Commander to complete the paperwork.
6.26	1.05	5.74	1.95	d. Let the Station Commander know that your paperwork will not be finished if you leave to help the other recruiter. If this is not a problem then help your coworker with the presentation.

In sum, the effectiveness level ratings generated by both the experienced recruiters and the new Soldiers were analyzed and used to identify similarities and differences in effectiveness level ratings between the two groups. Statistical comparisons both within and between groups allowed us to select the final set of response options for each situation, and to reduce the number of situations in anticipation of the pilot test.

At this point in the SJT development process we had a set of 66 situations targeted toward a variety of recruiting scenarios. Each situation was followed by four to five responses with varying levels of effectiveness.

## Conducting the Pilot Test and Creating an Answer Key

In mid-March, a pilot test was conducted with a group of experienced recruiters and a group of new, untrained recruiters beginning the ARC to collect data to further reduce the number of items and to create an answer key for the SJT. Fifty-two experienced recruiters participated in the pilot test in Portland and 58 new



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**Table 6. Characteristics of Participants in Pilot Tests**

	N	
	Experienced Recruiters (experts)	New Recruiters (novices)
Gender		
Male	48	56
Female	2	2
Missing	2	0
Race/Ethnicity		
African American/Black	7	16
Asian American/Pacific Islander	4	0
Caucasian/White	35	31
Hispanic/Latino/Mexican American	3	11
Other	1	0
Missing	2	0
Average number of years as a recruiter	4.59	0
Average number of years in the Army	15.76	9.48

Participants in the pilot test completed the same task as participants in the Effectiveness Level Workshops. The main reason for conducting the pilot test in addition to the Effectiveness Level Workshops was that the response options had been revised since those workshops in some cases, and now were in the same configuration as they would be on the final SJT (i.e., 4-5 response options rather than 4-12 for the previous workshop). Both groups' members rated the effectiveness of each response option using the same 7-point scale. The 66 situations were split into two booklets of 33 situations each, so group members rated only half the situations. Participants completed the pilot test along with a battery of other tests. Detailed instructions and examples were provided and PDRI staff were available if participants had questions. Instructions for the pilot test can be found in Appendix G.

The same data screening and analyses used for the Effectiveness Level Workshop were employed for the pilot test data. First, the data were screened to identify raters who did not appear to understand the rating task. Five raters were dropped from the expert group because the raters used the scales improperly (e.g., used a 9-point scale). We then correlated each rater's effectiveness ratings with the ratings provided by all other raters in their pilot test group. Two additional raters were dropped from the expert group because their mean correlations across all items were less than .40. Three raters were dropped from the novice group because their mean correlations across all items were less than .20.

For the remaining data, we calculated the intraclass correlation coefficients for each item within both the expert and the novice raters to assess the interrater reliability of the ratings within each group of raters. Again, we wanted to choose those items where experts agreed closely about the effectiveness levels, but where novices disagreed about the effectiveness level of the response options. There was, in general, high agreement among experts about the effectiveness levels of the response options (mean ICC=.93, sd=.06), but there was also high agreement among novices (mean ICC=.91, sd=.11). Nonetheless, there were items in the set of 66 that did meet the criteria used in the Effectiveness Level Workshop; that is, generally lower standard deviations for experts' response option ratings than were obtained in the novice group.

Specifically, we first eliminated those items with expert group ICCs of less than .75, indicating that the experts did not agree on the effectiveness levels of the response options. Next, we examined the mean effectiveness level ratings assigned to each response option and the percentage of raters rating each response option as most and least effective for both the expert and novice groups. Again, items were eliminated if they had a similar pattern of response option means or most/least effective ratings and small standard deviations for both the expert and novice groups, *or* large standard deviations for both groups. On the basis of these analyses, we retained 25 items for the final version of the Recruiter SJT.

The effectiveness ratings from the expert group's pilot test were used to develop a scoring key for the SJT. The SJT items are scored by subtracting the mean effectiveness rating for the response option that a recruiter selects as least effective from the mean effectiveness rating that a recruiter selects as most effective. This scoring method was selected based on Hanson's (1994) review of several different SJT scoring methods. She found that this "most effective minus least effective" scoring method produced SJT scores with better psychometric properties than other SJT scoring methods.

## Implementing the SJT at the Recruiting and Retention School

The SJT can be used in the RRS to provide students with feedback on how to handle difficult situations they may encounter in the field. A possible application is for instructors to administer the test and elicit from students their responses to the situations and then encourage discussion around each situation. The most powerful component related to this use of the SJT will be for the instructor, following a discussion of each situation, to review with students the expert-derived effectiveness level of each response option, and, most important, *why* some of the responses are better than others. Overall, the SJT should give the students a realistic preview of some of the challenging situations they will encounter in the field. By discussing the situations and responses together with the instructor, and receiving feedback on how experienced recruiters believe the situations *should* be handled, students should be able to learn the best ways to manage these difficult situations.

In addition, the situations in the SJT might be organized around categories that parallel the categories in the recruiter performance rating scales (e.g., Locating and Contacting Qualified Prospects, Selling Skills, Organizing Skills/Time Management, etc.). Students could examine their performance on the SJT in each of these areas to identify their strengths and weaknesses. For those areas of the SJT where they scored lower, they could pay particular attention to these aspects of the job when they begin their on-the-job training in the field. Additional SJT items not included on the current test could be provided to students, along with the supporting response option effectiveness data, for further diagnosis and practice.

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## Development of a New Simulation Exercise

Simulation exercises have long been recognized as relatively high fidelity assessments of present job performance, as well as predictors of future performance (e.g. Bray & Grant, 1966; Gaugler, Rosenthal, Thornton, & Bentson, 1987). These exercises, often characterized as work sample assessments, elicit samplings of job-relevant behavior by placing assesseees into situations designed to closely resemble the important activities of the target job. Assesseees are then asked to respond to these situations as if they were actually on the job. Based on the effectiveness of their responses, an evaluation may be obtained for each assessee's present job performance or potential for success in other (usually higher level) jobs. The Army has effectively used simulation-based assessments as a method for identifying potential for success in recruiting. For example, Borman and colleagues (Borman, 1979, 1982; Borman, Toquam, & Rosse, 1978) developed a series of recruiter oriented simulation exercises that were administered to new recruiters at the beginning of training. Recruiter performance on these exercises was highly related to their overall success in training ( $r$ 's approximately .50).

The Army adapted some of these simulation exercises for use in training and developing new recruiters during ARC training. When used in this context, simulations provide an effective vehicle for familiarizing newly selected recruiters to the role and helping them practice the skills that will be important for successful recruiter performance. The current ARC program employs multiple simulation exercises, ranging from five-minute telephone prospecting interviews, to half-hour multimedia sales presentations. These exercises cover a wide range of scenarios designed to represent the multifaceted nature of the recruiter job.

Our task here was to identify important elements of the recruiter job that may be underrepresented in the current array of simulation exercises. Thus, for this task we attempted to build upon existing simulations at the RRS by developing a new exercise targeting important recruiter performance areas not well covered by other exercises.

### Needs Analysis

The first step in developing this new exercise was to conduct a needs analysis of the school curriculum. This needs analysis involved a comparison of the performance areas required for success as a recruiter to the performance areas taught and evaluated by the current simulation exercises. To conduct this

analysis, we made a number of visits to the school. During these visits, we observed each exercise (i.e. the initial assessment, the telephone interview, the sales presentation, the multimedia presentation, and the DEP/DTP interview), and collected the rating/scoring forms used for each exercise. From this information, we were able to map the performance areas covered by the current exercises onto the performance areas derived from the job analysis. Table 7 shows the results of this analysis.

**Table 7. Role Play Exercise Coverage of Recruiter Performance Categories**

<b>Performance Category</b>	<b>Initial Assessment</b>	<b>Telephone</b>	<b>Sales Interview</b>	<b>Multi-media Presentation</b>	<b>DEP/DTP</b>
Locating and Contacting Qualified Prospects		X			
Gaining and Maintaining Rapport	X	X	X	X	X
Obtaining Information from Prospects and Making Good Person-Army Fits	X	X	X	X	
Salesmanship Skills	X	X	X	X	X
DEP/DTP Maintenance					X
Establishing and Maintaining Good Relationships in the Community					
Organizing Skills/Time Management					
Supporting Other Recruiters and USAREC					

As can be seen from this analysis, the exercises currently used by the school focus on the first five performance areas. Because of limitations in what can be taught at the school, this is quite reasonable. For example, incorporating the community-relations dimension into a school exercise would be difficult. However, the planning and organizing dimension and to some extent the supporting other recruiters dimension appeared more amenable to coverage with an exercise. From this, we believed that a recruiter-focused in-basket could provide data relevant to those two performance areas.

In addition to examining the performance areas not covered by the current exercises, we also gathered some information from instructors about what they thought the school could do to further ready students for the recruiter job. The

most dominant theme that emerged from these discussions was that students might benefit by getting a better feel for what it is like to be a recruiter before they are sent out into the field. With this in mind, we thought a simulation exercise that provides students with insights regarding the typical day-to-day tasks performed by recruiters might be a good way to help prepare them for their new position.

### **In-basket Item development**

Based on the results of the needs analysis, it was decided that an in-basket exercise might be a useful simulation to incorporate into the school curriculum. To develop the recruiter in-basket exercise, we began with an existing in-basket that was originally developed for an Army recruiter assessment center (see Borman, 1979). Using items from this exercise, we developed an initial 16-item version of the in-basket. Then, we conducted two workshops, with four instructors participating in each workshop. During these workshops we had the instructors read the in-basket items and provide feedback on whether the items effectively simulated important aspects of the recruiter job. We also asked them to provide ideas for new in-basket items. Finally, we had them discuss effective and ineffective ways to handle each item. Based on the input from these workshops, we dropped 7 of the existing 16 items, and developed ideas for 11 new items. These changes were the result of instructors suggesting that several of the items were either not relevant to the current recruiting environment, or not appropriate given the content that is covered in the school curriculum.

Based on the feedback from these workshops, we extensively revised the in-basket creating a new 20-item exercise that measures behaviors related to planning and time management, practical judgment, and teamwork skills. This new version of the in-basket was then reviewed by several of the instructors who participated in the initial workshops, and a few additional changes were incorporated.

### **Development of an In-Basket Scoring Guide**

We also developed a process for scoring the in-baskets. Initially, it was suggested that school instructors could score their students' in-baskets, as is done in most assessment centers, with the instructors/assessors reviewing each students' responses and evaluating the performance on a rating form. However, because each instructor can have up to 80 students at one time, it became apparent that this alternative would be too time consuming for the instructors. Thus, we developed an instructor debrief and student self-assessment approach. Using this format, each student attends an instructor-led in-basket debrief meeting. During this meeting, a school instructor reviews each in-basket item, describing effective and ineffective ways to deal with each issue, as well as providing personal examples of recruiting experiences related to these problems. With this approach,

students should gain insights into how they might most effectively deal with these types of issues when on the job. At the conclusion of the debrief meeting, participants score their performance using an in-basket self-assessment form.

To help instructors facilitate these debrief meetings, an instructor leader's guide was developed. The purpose of this guide was to provide instructors with the information and materials needed to facilitate the debrief meeting. Most of the information needed to create this guide was obtained from the in-basket development workshops where we collected effective and ineffective responses for each item.

## **Final Revisions**

Finally, we conducted a pilot test of the in-basket using school instructors as participants. The purpose of the pilot test was to have instructors complete the in-basket to get a sense of how long it takes to complete and determine if the items from the exercise generate an acceptable range of responses. Additionally, we wanted to get instructors' reactions to the debrief meeting leader's guide. Thus, participants provided reactions to the in-basket and the proposed debrief meeting. These suggestions prompted some minor changes to several of the in-basket items and an expansion of the scope of the debrief materials. From this, we created the final version of the in-basket items and the debrief meeting leader's guide. Finally, we created directions for the in-basket administrators. All of these materials can be found in Appendices H-K.

Another potential use for this in-basket exercise would be to create an online version as a self-development tool. ARC students and new recruiters could use the online version to identify areas for improvement and work with their instructors or Station Commanders to develop skills in those areas.



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## Development of an ARC Database for Future Research

The ARC conducts a fairly thorough evaluation of students' progress through training in preparation for the field. The knowledges required for successful performance as a recruiter (e.g., knowledge of enlistment eligibility standards, moral and administrative criteria, enlistment/waiver documentation, Regular Army and Army Reserve programs and options, recruiting incentives/awards, Lead Refinement Lists, etc.) are assessed through four written examinations. Additionally, students are required to pass several performance hurdles that evaluate their sales skills, prospecting techniques, salesbook and multimedia sales presentation skills, and computer skills. Based on our discussions with ARC instructors, it appears that training performance data on individual students is electronically maintained to a degree, but a more comprehensive database of student performance information would provide a foundation for future research on the ARC.

One potential research opportunity that a comprehensive database would afford is the ability to evaluate the validity of new recruiter selection procedures for predicting performance in training. It is, of course, of paramount importance for such selection tools to predict performance on the recruiter job. However, the prediction of success in training would also be desirable to allow USAREC to screen out NCOs very unlikely to perform effectively in training. Additionally, tracking student performance information would allow for an examination of the impact of training interventions on training performance; for example, the impact of any changes to the instructional strategy of the ARC. The information contained in a database would essentially provide cohort information against which to compare pre- and post-intervention student performance.

A final research area would be an evaluation of the ability of training to impact subsequent job performance. The qualitative analysis presented earlier provided useful information regarding how well the content of the ARC prepares students for recruiting duty. This analysis indicated that the content of the exercises used in the ARC, such as the role-plays, closely resemble the content of situations they are likely to encounter on the job. Also, the in-basket and SJT developed in this project provide additional course content that will help recruiters prepare for the field. Although this information is helpful, it does not guarantee that the appropriate knowledges and skills necessary for job performance are being learned and used by the students when they become recruiters. Therefore, it may also be useful to conduct a quantitative analysis of the relationships between the



students' performance in the ARC and subsequent performance on the job. This would provide more objective information regarding the ability of the ARC to prepare students for recruiting duty.

The establishment and maintenance of a database containing scores for each ARC student on several training performance indicators would be important for either generating training performance criterion data or conducting an evaluation of links between training performance and field recruiter performance. This database should, at a minimum, contain scores for each student attending the ARC on each of the four written tests and performance ratings for each student on each of the simulation exercises. Additional demographic information that may prove useful are: 1) whether the student volunteered for recruiting duty or was detailed; 2) date of birth; 3) gender; 4) race/ethnicity; and 5) rank.

In sum, such a database might be used in the future to evaluate new recruiter selection procedures regarding their validity for predicting performance in training or to evaluate the effects of new training interventions on student performance. It might also be useful to examine how closely student performance in training relates to production and job performance in the field.



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## Appendix A — Original Army Recruiter Performance Rating Scales

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## Army Recruiter Performance Rating Scales

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## A. Locating And Contacting Qualified Prospects

"Prospecting" effectively; contacting large numbers of persons likely to enlist in the Army; skillfully using the telephone, referrals, DEPs, advertising ideas, special events, etc., to contact and get the attention of civilians eligible for Army service; knowing where and when to prospect; ability to persist in prospecting and following up on leads even under considerable adversity; getting prospects into the office.

9 or 10 Extremely Effective Performance	
Displays exceptional ingenuity and energy in advertising the Army and in locating prospects.	Makes very judicious use of referrals or persons recruited recently or placed in DEP/DTP to get names of qualified young men and women likely to join the Army.
Is adept at using a <i>variety</i> of prospecting tools effectively: PDR/prospect cards, advertising, REACT, school contacts, personal appearances, telephone.	
6, 7 or 8 Effective Performance	
Uses a number of sources for prospecting such as unemployment offices, sports events, and employees at youth hangouts.	Often persuades prospects to visit the recruiting office by using the telephone effectively or by talking to prospects in person.
Follows up promising leads on potential recruits.	
3, 4, or 5 Marginal Performance	
Is sometimes slow and unaggressive in pursuing leads and may not make good use of recruits or others in obtaining leads.	Exerts effort prospecting, but does not seek prospects in optimal locations.
Sometimes spends too much time with a prospect at the expense of contacting other prospects, or spends time with a person who is disinterested or has something else to do.	
1 or 2 Ineffective Performance	
Possesses poor prospecting skills; is reluctant to make calls or may sound disinterested and bored when talking to prospects.	Uses very few prospecting tools; waits for prospects to come to him/her; almost always fails to follow up on leads, even promising ones.
Fails to become familiar with own recruiting zone, and thus lacks knowledge about sources of potential recruits.	

## B. Gaining And Maintaining Rapport

Building rapport with prospects in the office; gaining the trust and respect of prospects; adjusting to applicants' styles and acting appropriately with different types of applicants.

9 or 10 Extremely Effective Performance	
Greets all prospects appropriately; is adept at setting them at ease and getting them to talk, regardless of their background, race, or personality; deals very effectively with persons of all races.	Answers prospects' questions politely and patiently, no matter how unimportant they seem; is excellent at establishing rapport over the phone <i>or</i> in person.
6, 7 or 8 Effective Performance	
Is almost always able to put prospects at ease when they first enter the office.	Shows interest in most persons who enter the office and interacts with them in a warm and friendly way.
3, 4, or 5 Marginal Performance	
Has a standard approach with all persons which, at times, is inappropriate, such as a manner of greeting, speech, or telling war stories.	Is discourteous at times; for example, will sometimes interrupt an applicant while he/she is speaking.
1 or 2 Ineffective Performance	
Ignores or is rude to applicants who do not seem, at first sight, to be "good soldiers."	Is cold and impolite upon initial meeting and answers questions in a disinterested, nonpersonable way.

## C. Obtaining Information From Prospects and Determining Their Needs and Interests

Listening skills; making accurate judgments about prospects' needs, goals and desires, etc., based on good interviewing skills; effectively obtaining information about prospects from other sources (e.g., high school principal) to assess their qualifications and needs; accurately assessing prospects' eligibility for various programs.

9 or 10 Extremely Effective Performance		
Always listens attentively to applicant and then asks the right questions at the right time so that applicant reveals both positive and negative information and his/her interests and capabilities.	Always obtains relevant information about prospects' interests, abilities and, when applicable, needs for waivers by talking with prospects' school counselors, teachers, friends, and parents in a discreet, genuinely interested manner.	Consistently remembers and analyzes information gathered from prospects to make wise suggestions about programs to consider; very rarely mismatches an applicant's interests with Army program requirements.
6, 7 or 8 Effective Performance		
Listens to individuals' reasons for considering the Army and asks questions about their interests.	Usually makes necessary checks on applicants to determine their eligibility for enlistment; knows when specific checks are necessary; administers CAST properly.	Tries to identify Army programs that are well suited for the applicant's needs, interests, and capabilities.
3, 4, or 5 Marginal Performance		
Sometimes talks too much without letting prospects or applicant talk enough; doesn't always learn enough about the individual to recommend appropriate programs.	May check a few references to learn about an applicant but does not always make necessary checks.	Suggests programs prematurely or suggests programs that do not result in a good match for the individual and the Army.
1 or 2 Ineffective Performance		
Ignores applicants' stated interests; doesn't probe to identify dominant buying motive.	Learns very little from others about applicants; may fail to check references even when it is important to do so; may administer CAST improperly and lose or fail to obtain CAST results.	Suggests programs applicant is either not qualified for or not interested in.

## D. Sales Skills

Skillfully persuading prospects to join the Army; using Army benefits and opportunities effectively to sell the Army; closing skills; adapting selling techniques appropriately to different prospects; effectively handling objections to joining the Army.

9 or 10 Extremely Effective Performance		
Is able to sell almost any appropriate program to an applicant even when the applicant is set on a different program for which he/she does not qualify; describes Army life in an appropriate and convincing way for each prospect.	Always knows when to close the sales presentation and start processing the paperwork; is excellent at "closing the sale."	Knows just the right people to include or to mention while talking with a prospect; consistently identifies those benefits most likely to convince each prospect; is exceptionally effective and quick in handling objections about the Army or a program.
6, 7 or 8 Effective Performance		
Is capable of selling several programs; shows films relevant to programs and to Army life; uses JOIN or the sales book effectively to help sell Army.	Usually asks prospect if he/she is ready to enlist after presenting a convincing sales presentation about joining the Army.	Often mentions specific benefits likely to persuade a prospect; describes Army life well; is prepared to handle frequently heard objections about the Army.
3, 4, or 5 Marginal Performance		
Describes Army benefits, programs, and life in a way that is not always suited to the particular prospect.	Sometimes misses opportunities to close a sale; for example, may oversell prospects after they say they are ready to enlist.	Tends to emphasize benefits or aspects of Army life which are not very relevant or appealing to the particular prospect; may describe Army life, benefits, and programs in a bland, unenthusiastic manner.
1 or 2 Ineffective Performance		
Often oversells a specific program and loses prospects when they don't qualify for it; neglects to describe important aspects of Army life, often resulting in lack of interest on part of prospect.	Ignores criticisms of Army life a prospect makes; often confuses applicant with rambling or otherwise ineffective sales presentation.	Is frequently unable to handle objections to joining the Army; may end a conversation when prospect states an objection.

## E. Establishing And Maintaining Good Relationships In The Community

Contacting and working effectively with high school counselors and principals, civic leaders, and others capable of helping recruiters to enlist prospects; building a good reputation for the Army by developing positive relationships with persons in the community; establishing and maintaining good relationships with parents and family of prospects; presenting a good Army image in the community.

9 or 10 Extremely Effective Performance	
Is exceptionally adept at cultivating and maintaining excellent relationships with school counselors, teachers, principals, police, local business persons, and others who are important for getting referrals.	Is innovative in informing community members about the Army; actively promotes the Army and makes friends for the Army while doing it.
May volunteer off-duty time to work on community projects, celebrations, parades, etc.	
6, 7 or 8 Effective Performance	
For the most part, spends productive time with individuals such as police, city government, or school officials; may personally lunch with them, distribute calendars, appointment books, buttons, etc., to them, and/or invite them to COI luncheons.	Arranges for COIs such Army activities as educator tours; keeps relevant persons informed of Army activities.
	Encourages principals, counselors, and other persons important to a prospect to call if they have any questions about the Army.
3, 4, or 5 Marginal Performance	
Relationships with COIs and persons important to an applicant are distant and underdeveloped; rarely contacts school officials; keeps them waiting for information they want.	Is not alert to opportunities to promote the Army; rarely volunteers off-duty time to promote the Army and is unenthusiastic when approached to do something for the community; rarely accepts speaking invitations.
	Is, at times, discourteous to persons in the community; for example, sends form letters to persons who have assisted him or other Army recruiters; is not always alert to the family's need for more information about the Army and the program in which their son or daughter enlisted.

## E. Establishing And Maintaining Good Relationships In The Community

1 or 2 Ineffective Performance		
Does not contact high school counselors or others capable of helping him/her enlist prospects; does not accept speaking engagements; drives around in car instead of getting out and meeting people.	Alienates persons in community or persons important to an applicant or recruit by ignoring them, not answering their questions, responding rudely, demanding information, encouraging high school students to drop out of school; does not appear at recruiting presentations for which he/she is scheduled.	Presents negative image of the Army by doing things like driving while intoxicated or speeding; may express dislike for the Army or recruiting.

## F. Providing Knowledgeable And Accurate Information About The Army

Displaying considerable knowledge about Army programs, schools, educational opportunities, etc.; providing accurate information about Army life; being up to date on changes in Recruiting Regulations and on other directives pertaining to program changes, eligibility for programs etc.; skillfully relaying information about BCT so that prospect/ recruit is informed about what to expect but is not discouraged from joining the Army; answering questions about the Army in a competent manner.

9 or 10 Extremely Effective Performance		
Consistently describes Army life accurately, honestly, and to the best of own knowledge; thoroughly prepares applicants for BCT and Army life.	Consistently provides accurate information about Army benefits, education, etc.; when uncertain immediately obtains the correct information; provides detailed and complete information when appropriate and when asked.	Studies and learns as much Army information as possible without decreasing recruiting time.
6, 7 or 8 Effective Performance		
Keeps current on the basics of all Army programs.	Prepares applicants for recruitment process; when appropriate, describes parts of BCT and Army life to prospects.	Competently answers most questions from prospects about Army life, programs, BCT, etc.
3, 4, or 5 Marginal Performance		
Mentions specific aspects of BCT, programs, benefits, and life in the Army, but descriptions are often incomplete.	Sometimes provides inaccurate information about programs, BCT, etc.	Is not well informed or knowledgeable about several programs and benefits of the Army.
1 or 2 Ineffective Performance		
Frequently fails to prepare applicants for life in the Army; fails to brief the applicant about BCT; describes aspects of the Army irrelevant to a prospect.	Spends little time in learning about Army programs, and so is unable to describe many of them for which an applicant is qualified.	Often provides inaccurate information, thus causing recruits to expect events which never occur.

## G. Organizing Skills

Planning ahead; organizing time efficiently; completing paperwork accurately and on time; keeping track of appointments; not wasting time.

9 or 10 Extremely Effective Performance		
Maintains a complete and accurate calendar of relevant community, school, and Army events and holidays; schedules meetings, interviews, physicals, etc., wisely in order to use own and others' time most efficiently.	Finishes all paperwork accurately and on time; for example, when going on leave, all paperwork is complete prior to departing.	Devises monthly, weekly, and daily plans, and follows them in order to achieve own and station goals; when changes in daily schedule occur, completes other necessary tasks.
6, 7 or 8 Effective Performance		
Completes packets, forms, etc., on time with few errors; may collect information by phone to complete paperwork on time.	Keeps a record of appointments and applicant physicals.	Generally uses time efficiently; does paperwork at times when not likely to meet prospects; on out-of-town calls, often meets with others along the way.
3, 4, or 5 Marginal Performance		
Completes paperwork either just barely in time, or not on time; errors in packets and PDRs are common; some forms are not sent in again, delaying enlistment process.	Fails to use dead time wisely; for example, might spend an undue amount of time providing prospects and applicants with transportation.	Tends to schedule appointments, physicals, etc., without considering other events.
1 or 2 Ineffective Performance		
Packets invariably contain errors or are incomplete; consistently forgets to complete all the necessary forms.	Does not maintain a record of appointments, and so may schedule two at the same time, or schedule appointments too closely together; misses appointments.	Does not know what to do with time, needs to be told what to do.



## H. Supporting Other Recruiters and USAREC

Coordinating activities with other recruiters to maximize the productivity of the station and company; using own skills and/or time to support other Army recruiters when appropriate; pitching in to support orders and directives from higher levels; providing constructive feedback to other Army recruiters concerning their skills, style, etc.; providing helpful tips to new recruiters.

### 9 or 10

#### Extremely Effective Performance

Places station and battalion quotas above personal quotas/mission boxes; for example, will encourage prospects to sign up during current month if station needs enlistments, rather than next month when he/she personally needs more.

Is always enthusiastic and works to build group spirit when other recruiters are down; enhances the team spirit even when he/she has personal problems; is always concerned about other recruiters' personal and professional difficulties and always helps them if possible.

Consistently works with others to improve selling and interviewing skills; provides valuable feedback to other recruiters; always shares information such as important contacts which can increase station production or reduce technical red tape.

### 6, 7 or 8

#### Effective Performance

Contributes to station/battalion effectiveness by working to meet personal mission/quotas; occasionally works beyond accomplishing mission to meet station/battalion goals.

Helps other recruiters with paperwork; answers their phone when they are out; may get transcripts or parental consent for other recruiters.

Occasionally works with other recruiters to improve interviewing or selling techniques; shares with other recruiters prospects that he/she has attracted.

### 3, 4, or 5

#### Marginal Performance

Occasionally gives negative feedback to other recruiters, even when it isn't warranted; does not provide feedback to other recruiters when it is needed or they want it.

Complains about production quotas/mission boxes or having to work extra time to get an appointment.

Sometimes fails to assist another recruiter when help is needed; tends to give ambiguous responses to other recruiters' questions.

### 1 or 2

#### Ineffective Performance

Is quick to take personal credit when station achieves goals and either doesn't care or is quick to blame others when the station does not; lets other recruiters carry his/her recruiting load.

Interferes with the group effort by not answering the phone, neglecting to give messages to persons for whom intended, not communicating and coordinating schedule with others, or tying up the vehicles so other recruiters miss appointments.

Is very temperamental and cannot get along with other recruiters; may inappropriately interrupt other recruiters' interviews.

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## Appendix B — Instructions for Scale Retranslation Workshop

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## **Army Recruiter Performance Rating Scales**

*Retranslation Workshop Instructions*



## **Background**

Personnel Decisions Research Institutes (PDRI) was tasked by the Army to develop behavior based performance rating scales for the Army recruiter job. We have developed this kind of performance rating format for a number of jobs in industry and for other U.S. military jobs.

## **Purpose of the Workshop**

In this workshop, you will be providing information that will be used to develop an instrument for rating the job performance of Army recruiters. In previous workshops, we asked experienced Army recruiters to describe examples of recruiter *behaviors* that they had observed. We collected a large number of these "performance examples" describing ineffective, acceptable, and highly effective levels of recruiter performance. These examples were provided anonymously, but reflect what *actually happens* in the field. We then summarized more than 1,000 of these examples into behavior statements reflecting, respectively, very effective, effective, somewhat ineffective, and ineffective recruiter performance.

In today's workshop, we are asking you to read these performance statements, place them in categories we will show you in a moment, and rate the effectiveness of the behavior described in each performance statement.

## **Completing the Performance Example Rating Task**

For each of 32 performance statements, we ask you to make two judgments:

1. Determine the Army recruiter performance category in which the statement best fits; and
2. Rate the effectiveness of the behavior described in the statement.

Before you begin making your judgments, please review the *Army Recruiter Performance Categories* carefully. This handout lists and defines a set of categories relevant to the performance of Army recruiters. Once you have become familiar with these performance categories, you will be ready to begin the rating task.

The effectiveness ratings that you assign to each performance statement will range from 1 to 4, as follows:

- 1 = Ineffective
- 2 = Somewhat Ineffective
- 3 = Effective
- 4 = Very Effective

To help calibrate your effectiveness ratings, we provide a couple of example statements to clarify the distinctions between the levels of performance.

- A. Usually persuades prospects to visit recruiting office by using the telephone effectively or by talking to prospects in person.
- B. Makes highly judicious use of recent recruits, or those placed in DEP, to get names of qualified young men and women likely to join the Army.

Notice that Example A is effective but probably not "very effective," so a 3 rating might be the most appropriate effectiveness rating. Example B is probably more appropriately at the 4 or "very effective" level. Now review the next two examples

- C. Fails to use dead time wisely; for example, might spend excess time providing transportation for prospects and applicants.
- D. Does not know what to do with time, needs to be told what to do.

Example C is more like "somewhat ineffective" than "ineffective," so we would give this example a 2 rating. Example D probably deserves a 1 rating.

Now please open the envelope containing the performance statements and remove them. The task is to sort each statement into one of the 8 Performance Categories and also rate the effectiveness level (1, 2, 3, or 4) of each statement. Probably the best way to do this is to first complete the sorting of all 32 statements into the 8 Performance Categories. This should result in about 4 statements per category. *Then*, review the performance statements *within* each category, decide on the effectiveness level of each, and record the category letter (A-H) and the effectiveness rating (1 = ineffective, 2 = somewhat ineffective, 3 = effective, 4 = very effective) on each statement in the blanks provided. After you have included that information on each and every statement, place clips on each of the Performance Category's (i.e., A-H) statements and put all of the statements back in the envelope.

Thank you for helping us with this task. We will send the final version of the rating scales to Sgt. Major Furlow and, if you like, you can get a copy from him.

#### **A. Locating And Contacting Qualified Prospects**

Contacting large numbers of persons likely to join the Army; skillfully using available recruiting aids to gain the attention and interest of young persons eligible for Army service; knowing where and when to prospect; persisting in prospecting and following up on leads even under considerable adversity.

#### **B. Gaining And Maintaining Rapport**

Being hospitable to prospects in the office; gaining the trust and respect of prospects; adjusting to applicants' styles and acting appropriately with different types of applicants.

#### **C. Obtaining Information From Prospects And Making Good Person-Army Fits**

Demonstrating good listening and interviewing skills; making accurate judgements and suggesting options to match prospects' needs and preferences; effectively obtaining information about prospects from other sources (e.g., high school principal, parents) to assess their qualifications and needs.

#### **D. Salesmanship Skills**

Skillfully persuading prospects to join the Army; selecting and adapting selling techniques appropriate to different prospects, effectively presenting Army benefits and opportunities; identifying and overcoming objections to joining the Army; persisting to close the sale.

#### **E. DEP/DTP Maintenance**

Skillfully relaying accurate information about BCT, Army life, and the Army's expectations so that prospects/recruits know what to expect; training DEP/DTPs to standards on pre-BCT tasks (e.g. hand salute, physical fitness standards); following up and maintaining relationships with DEP/DTPs and their families, effectively overcoming objections and buyer's remorse to ensure DEP/DTPs maintain enlistment intentions.

#### **F. Establishing And Maintaining Good Relationships In The Community**

Contacting and working effectively with individuals and agencies capable of helping with prospects; presenting a good image and building a good reputation for the Army by developing positive relationships with persons in the community; presenting a good Army image through appearance, language, and demeanor.

### **G. Organizing Skills / Time Management**

Planning ahead; organizing time efficiently; completing paperwork accurately and on time; keeping track of appointments; not wasting time; knowing how to locate important reference materials (e.g. qualifications, regulations, standards); ensuring that recruits are processed by quickly and efficiently getting them to the MEPS and into the Army.

### **H. Supporting Other Recruiters And The Command**

Coordinating activities with and supporting other recruiters to maximize the productivity of the station and battalion; complying with and supporting orders and directives from higher levels; mentoring or providing helpful tips and constructive feedback to other Army recruiters concerning their skills, style, etc.; especially if they are new.



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## Appendix C — Updated Army Recruiter Performance Rating Scales

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## Army Recruiter Performance Rating Scales

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### A. Locating And Contacting Qualified Prospects

Contacting large numbers of persons likely to join the Army; skillfully using available recruiting aids to gain the attention and interest of young persons eligible for Army service; knowing where and when to prospect; persisting in prospecting and following up on leads even under considerable adversity.

Exerts little effort prospecting; for example, often fails to follow up on even promising leads, and uses recruiting tools (e.g., telephone, RTools) sparingly and ineffectively.	Exerts effort prospecting, but may use a limited number of recruiting tools and may not spend enough time with or direct sufficient effort toward the most productive sources and prospects.	Uses a number of sources and recruiting tools for prospecting and is effective at locating and contacting qualified prospects.	Displays exceptional ingenuity and energy and uses a wide variety of recruiting tools very effectively to locate and contact qualified prospects.						
①	②	③	④	⑤	⑥	⑦	⑧	⑨	⑩

## B. Gaining And Maintaining Rapport

Being hospitable to prospects in the office; gaining the trust and respect of prospects; adjusting to applicants' styles and acting appropriately with different types of applicants.

Is very poor at gaining and maintaining rapport; appears disinterested in applicants or may answer questions in an impersonal way.	Has trouble interacting with certain prospects; sometimes appears disinterested in a prospect or may have a standard approach to interacting that is inappropriate for some prospects.	Is typically able to put prospects at ease, and maintains good rapport with them; interacts with most prospects in a warm and friendly way.	Interacts very effectively with all types of prospects; is excellent at gaining and maintaining rapport and establishing trust with prospects.
①	②	③	④
	⑤	⑥	⑦
	⑧	⑨	⑩

### C. Obtaining Information From Prospects And Making Good Person-Army Fits

Demonstrating good listening and interviewing skills; making accurate judgements and suggesting options to match prospects' needs and preferences; effectively obtaining information about prospects from other sources (e.g., high school principal, parents) to assess their qualifications and needs.

Is very poor at getting prospects to reveal their needs and buying motives, making it difficult to suggest appropriate Army opportunities; may suggest features or programs that clearly don't interest prospect.	Sometimes fails to learn enough about prospects to identify their primary needs and buying motives; may suggest Army features and benefits that do not result in a good match with the individual's needs.	Is good at blueprinting most prospects, evaluating their needs, and then discussing Army opportunities appropriate for meeting those needs.	Always blueprints effectively, identifying prospects' needs and career motivations and then is excellent at emphasizing Army features and opportunities that address these needs and motives.
①	③	⑥	⑩
②	④	⑦	⑨

### D. Salesmanship Skills

Skillfully persuading prospects to join the Army; selecting and adapting selling techniques appropriate to different prospects, effectively presenting Army benefits and opportunities; identifying and overcoming objections to joining the Army; persisting to close the sale.

①	Fails to present Army features/benefits to influence individual prospects, and is frequently unable to identify or overcome objections to joining the Army; often misses opportunities to close even when it's clearly appropriate to do so.	②	Presents Army features and benefits in a way that is sometimes not suitable for an individual prospect and may not identify prospects' objections to the Army; at times, misses opportunities to close.	③	Presents Army features/benefits so that most prospects become more interested in the Army; recognizes and is prepared to overcome frequently heard objections about the Army; knows when and how to close in most situations.	④	Presents Army life and benefits in a highly appropriate and convincing way for each prospect, and is very adept at identifying and overcoming any objections about the Army; never misses opportunities to close.	⑤	⑩
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### E. DEP/DTP Maintenance

Skillfully relaying accurate information about BCT, Army life, and the Army's expectations so that prospects/recruits know what to expect; training DEP/DTPs to standards on pre-BCT tasks (e.g. hand salute, physical fitness standards); following up and maintaining relationships with DEP/DTPs and their families, effectively overcoming objections and buyer's remorse to ensure DEP/DTPs maintain enlistment intentions.

<p>① Fails to maintain contact with DEP/DTPs after they enlist; provides DEP/DTPs with minimal or inaccurate information about Army life; rarely prepares them for BCT, and exerts little effort to counsel individuals who no longer wish to enlist.</p>	<p>② Sporadically contacts DEP/DTPs after mandatory follow-up; may miss signs of buyer's remorse; spends little time training DEP/DTPs to standard on pre-BCT tasks, and may provide incomplete information about Army life.</p>	<p>③ Follows up with DEP/DTPs and their families as needed; responds to concerns in a sensitive manner; works to train DEP/DTPs to standard and accurately describes Army expectations and BCT to prepare them for Army life.</p>	<p>④ Maintains contact with and provides emotional support to all DEP/DTPs and their families; thoroughly prepares DEP/DTPs for BCT and Army life by training them to standard and providing complete, detailed information about Army life and expectations.</p>
<p>⑤</p>	<p>⑥</p>	<p>⑦</p>	<p>⑧</p>

## F. Establishing And Maintaining Good Relationships In The Community

Contacting and working effectively with individuals and agencies capable of helping with prospects; presenting a good image and building a good reputation for the Army by developing positive relationships with persons in the community; presenting a good Army image through appearance, language, and demeanor.

<p>Avoids personal contact or alienates individuals in the community by making demands or failing to honor commitments; presents negative image of the Army by poor personal appearance or behavior.</p>	<p>Does not make regular contact with community agencies that might be helpful in recruiting, and does not develop relationships fully; is not particularly alert to opportunities to promote the Army.</p>	<p>Spends productive time with individuals/agencies, and keeps them informed of most Army activities; may arrange Army activities for community persons who can help in recruiting.</p>	<p>Is exceptionally alert to and adept at developing relationships with relevant individuals and community agencies, and promotes a strongly positive image of the Army; may volunteer off-duty time to help in the community.</p>
①	③	⑥	⑩
②	④	⑦	⑨



## G. Organizing Skills/Time Management

Planning ahead; organizing time efficiently; completing paperwork accurately and on time; keeping track of appointments; not wasting time; knowing how to locate important reference materials (e.g. qualifications, regulations, standards); ensuring that recruits are processed by quickly and efficiently getting them to the MEPS and into the Army.

Consistently fails to complete necessary forms; or may use wrong forms; organizes time poorly and does not maintain applicant log/planner.	Sometimes completes paperwork late, occasionally, with significant errors; is somewhat inefficient in use of time, and may at times schedule appointments without considering other events.	Usually completes paperwork on time and with few errors; keeps an accurate applicant/log planner, and generally uses time efficiently.	Accurately completes all paperwork, prior to or as scheduled; devises plans so as to achieve own and station goals; maintains complete calendar of relevant events, and schedules work activities very efficiently and effectively.
①	③	⑥	⑨
②	④	⑦	⑩

## H. Supporting Other Recruiters And USAREC

Coordinating activities with and supporting other recruiters to maximize the productivity of the station and battalion; complying with and supporting orders and directives from higher levels; mentoring or providing helpful tips and constructive feedback to other Army recruiters, especially if they are new.

<p>Rarely cooperates with, supports, or helps other recruiters, even if requested, and lets others carry the recruiting load; may interfere with the group effort by withholding important information or not coordinating own activities with others.</p>	<p>May assist other recruiters when specifically asked but does not look for opportunities to help or support others; often complains about mission, or having to work extra time.</p>	<p>Supports the Command in ways that are helpful; usually places station/battalion mission above personal goals, and generally cooperates and works well with fellow recruiters.</p>	<p>Is always enthusiastic and works to build group spirit; consistently helps other recruiters, even when he/she is busy; always shares information so as to increase group production.</p>
①	③	⑥	⑨
②	④	⑦	⑩

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## Appendix D — Situational Judgment Test Situation Generation Workshop Instructions

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**ARMY RECRUITER SITUATIONAL JUDGMENT TEST**

***Situation Generation Workshop Instructions***



## BACKGROUND

Personnel Decisions Research Institutes, Inc. (PDRI) was tasked by the Army to develop a *Situational Judgment Test* to use as part of the Army Recruiting and Retention School.

*Situational Judgment Tests* present written descriptions of realistic and challenging work situations that are similar to situations that recruiters might encounter on the job. After reading each situation and the response options, recruiter students are asked to indicate which response option would be best in each situation.

Below are two examples of Situational Judgment Test items.

### Example Item 1

You and another recruiter from your station are jointly responsible for coordinating a recruiting presentation to a local high school. This other recruiter is not carrying his/her share of the responsibilities. What should you do?

- a. Discuss the situation with your station commander and ask your station commander to take it up with the other recruiter.
- b. Remind the other recruiter that you need help and that the project won't be completed effectively without a full team effort from both of you.
- c. Tell the other recruiter that he/she is not doing a fair share of the work, that you will not do it all yourself, and that if he/she doesn't start doing more, you'll be forced to take the matter to the station commander.
- d. Try to find out why the other recruiter is not doing his/her share and explain that this creates more work for you and makes it harder to finish the project.
- e. Get another recruiter to help with the project.

### Example Item 2

A parent calls to complain about the program his child has been assigned to as a new recruit. You've explained the different programs and the eligibility requirements, but the parent is having trouble understanding them and is getting upset with you. What should you do?

- a. Ask the parent to come to the office to discuss the programs. Patiently go over the programs and eligibility requirements step by step.
- b. Give the parent a detailed explanation of the assignment process. Then go over the programs and eligibility requirements again.
- c. Tell the parent to calm down and ask if he would like to call back later.
- d. Ask the parent to have the new recruit explain the programs.

## PURPOSE OF TODAY'S WORKSHOP

The purpose of today's workshop is to collect descriptions of challenging and realistic work situations from recruiters and instructors with extensive knowledge of the recruiting job. We would like you to write descriptions of specific, challenging work situations you've encountered as a recruiter.

The situations you provide will be developed into *Situational Judgment Test* items that are similar in format to the examples provided on the previous page. Your knowledge is critical to the development of items that are appropriate and relevant to the recruiter job. Your individual responses will be treated as confidential and will not be released to the Army.

We would like you to write your situations in a standard way to ensure that each situation provides the type of information necessary for a useful item. Please keep these important characteristics in mind as you write situations.

### Characteristics of a "Good" Situation

- The situation is **realistic**.
- The situation **requires a response**.
- The situation is **important**. A person's response in the situation will impact one or more important work-related outcomes.
- The situation is **challenging**. Write about situations that are difficult enough that the correct answer is not obvious to less experienced recruiters.
- The situation provides **sufficient detail** to help the respondent make a choice between possible actions.
- There is a **correct way to respond to the situation**, or at least some responses are better than others and the response can be communicated in just a few sentences.

The two situations on the first page are examples of "good" situations. Below are two examples of "poor" situations.

### Example Item 3

A prospect calls in for more information on Army programs. What should you do?

This situation is realistic and important, but it is not challenging, nor does the situation provide sufficient detail to help the respondent choose between different courses of action.

#### Example Item 4

It's 1600 and you get a call to do a speech at a local club at 1800. You have a meeting with a prospect scheduled at the same time and you try to get in touch with the prospect to change the meeting time. You look through your contact notes to find more information about the prospect. You find her phone number and notes about her after-school activities. First, you call her at home. You cannot reach the prospect or anyone else at her home and you think she's probably at soccer practice or at work. You look at your notes again and call her work number and she's not there. You think about going to the soccer field to see her now, but you need time to prepare your presentation for this evening. This is a good prospect though and you don't want to miss your meeting. What should you do?

This situation is realistic and challenging, but it is overly wordy and detailed. A shortened version of this same situation would be better.

The situations you write about can cover a range of job tasks. The last two pages of this hand-out list some examples of categories of job-relevant situations that were identified as important by recruiters. We would like you to write one or two situations and responses for each category. Sample types of situations are provided under each category heading. The samples should be helpful in recalling challenging situations you have encountered in the course of your work. You can also describe other types of situations. In future workshops we will obtain additional realistic responses to the situations you generate.

Please refer back to the guidelines for a "good" situation as you are writing to ensure that each situation has these characteristics. After you finish writing each situation, please indicate which category and/or type of situation your example reflects (e.g., Sales Skills).

We are interested in collecting as many useful, work-related situations as possible. Today's workshop is part of the first step in a multi-step process. Our interest at this point is in collecting a large number of useful, work-related situations. We are less concerned that you use perfect grammar or an elegant writing style.

Your participation in this workshop is greatly appreciated, and provides information that is critical to the development of the *Situational Judgment Test*. The information you provide will remain completely confidential. Thank you for your input.



## **Categories of Possible Situations**

### **1. *Locating and Contacting Qualified Prospects***

- Situations that require skillfully using a variety of recruiting aids to gain attention and interest of young persons eligible for Army service.
- Situations that require using creative techniques to locate prospects.
- Situations that require persistence in following leads, even under adverse conditions.
- Situations that require knowledge of recruiting zone to obtain leads.
- Situations that require using recruit knowledge or referrals to identify other potential recruits.
- Situations that require an understanding of when to stop pursuing unlikely leads.
- Situations that require displaying energy and excitement when contacting leads.
- Situations that require persuading prospects to visit recruiting office.

### **2. *Gaining and Maintaining Rapport***

- Situations that require encouraging prospects to talk and setting prospects at ease.
- Situations that require building rapport with prospects regardless of their race, ethnicity, background or personality.
- Situations that require maintaining a courteous, and friendly atmosphere.
- Situations that require sincerely displaying interest in and concern with prospects' activities.
- Situations that require responding to prospects' questions patiently and honestly, no matter how trivial their questions may seem.

### **3. *Obtaining Information from Prospects and Making Good Person-Army Fits***

- Situations that require attentively listening to prospects and asking questions to encourage them to reveal their interests and motivations.
- Situations that require using other sources (e.g., high school principal, parents) to identify prospects' qualifications and needs.
- Situations that require using CAST, reference checks, etc. to accurately assess prospects' eligibility.
- Situations that require recommending appropriate programs by combining knowledge of various programs and an accurate assessment of prospect's skills and interests.

### **4. *Salesmanship Skills***

- Situations that require convincing prospects that the Army will meet their particular needs and interests.
- Situations that require adapting one's style and sales pitch to different prospects.
- Situations that require effectively identifying and overcoming objections to joining the Army.
- Situations that require using knowledge of Army benefits and opportunities to sell the Army.
- Situations that require appropriately and convincingly describing Army life.
- Situations that require selling applicants programs for which they are qualified.
- Situations that require using closing skills successfully.

### **5. *DEP/DTP Maintenance***

- Situations that require following up and maintaining relationships with DEP/DTPs and their families.
- Situations that require skillful presentation of information about BCT, Army life, and the Army's expectations so prospects/recruits know what to expect.
- Situations that require effectively overcoming objections and buyer's remorse to ensure DEP/DTPs maintain enlistment intentions.
- Situations that require training DEP/DTPs to standards on pre-BCT tasks (e.g., hand salute, physical fitness standards).

### **6. *Establishing and Maintaining Good Relationships in the Community***

- Situations that require contacting and working effectively with school counselors, teachers, principals, police, local business persons and others.
- Situations that require establishing and maintaining good relationships with parents and families of prospects.
- Situations that require displaying enthusiasm for Army.
- Situations that require presenting a good Army image to the community through appearance, language, and demeanor.
- Situations that require keeping individuals/agencies informed of relevant Army activities.

### **7. *Organizing Skills/Time Management***

- Situations that require planning and scheduling one's own and other's activities so work is completed efficiently and deadlines are met.
- Situations that require keeping track of details or making sure all paperwork is accurate and complete.
- Situations that require keeping accurate records of appointments and events.
- Situations that require managing and not wasting one's own time.
- Situations that require knowing how to locate important reference materials (e.g., qualifications, regulations, standards).
- Situations that require quickly and efficiently processing recruits into MEPS and the Army.
- Situations that require planning high school penetration strategies.
- Situations that require planning college recruiting programs.

### **8. *Supporting Other Recruiters and USAREC***

- Situations that require coordinating activities with and supporting other recruiters to maximize productivity of the station and battalion.
- Situations that require complying with and supporting orders and directives from higher levels.
- Situations that require mentoring or providing constructive feedback to other Army recruiters concerning their style, skills, etc.
- Situations that require providing helpful tips and on-the-job training to new recruiters.
- Situations that require sharing information that would be helpful to other Army recruiters.
- Situations that require building enthusiasm and team spirit when other recruiters are "down".
- Situations that require helping other Army recruiters with personal and professional difficulties when appropriate.

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## Appendix E — Situational Judgment Test Response Generation Workshop Instructions

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# ARMY RECRUITER SITUATIONAL JUDGMENT TEST

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## *Response Generation Workshop Instructions*

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### BACKGROUND

Personnel Decisions Research Institutes, Inc. (PDRI) was tasked by the Army to develop a *Situational Judgment Test* to use as part of the Army Recruiting and Retention School.

*Situational Judgment Tests* present written descriptions of realistic and challenging work situations that are similar to situations that recruiters might encounter on the job. After reading each situation and the response options, recruiter students are asked to indicate which response option would be best in each situation.

Below are two examples of Situational Judgment Test items.

#### **Example Item 1**

You and another recruiter from your station are jointly responsible for coordinating a recruiting presentation to a local high school. This other recruiter is not carrying his/her share of the responsibilities. What should you do?

- a. Discuss the situation with your station commander and ask your station commander to take it up with the other recruiter.
- b. Remind the other recruiter that you need help and that the project won't be completed effectively without a full team effort from both of you.
- c. Tell the other recruiter that he/she is not doing a fair share of the work, that you will not do it all yourself, and that if he/she doesn't start doing more, you'll be forced to take the matter to the station commander.
- d. Try to find out why the other recruiter is not doing his/her share and explain that this creates more work for you and makes it harder to finish the project.
- f. Get another recruiter to help with the project.

#### **Example Item 2**

A parent calls to complain about the program his child has been assigned to as a new recruit. You've explained the different programs and the eligibility requirements, but the parent is having trouble understanding them and is getting upset with you. What should you do?

- a. Ask the parent to come to the office to discuss the programs. Patiently go over the programs and eligibility requirements step by step.
- b. Give the parent a detailed explanation of the assignment process. Then go over the programs and eligibility requirements again.
- c. Tell the parent to calm down and ask if he would like to call back later.
- d. Ask the parent to have the new recruit explain the programs.

## Purpose of today's workshop

In previous workshops, experienced recruiters wrote descriptions of challenging and realistic job situations. These situations will serve as the item stems for the test. Today, we are asking for your help to review and refine the situations and generate response options. The situations and response options will be used to develop *Situational Judgment Test* items that are similar in format to the examples provided on the previous page. Your job knowledge is critical to the development of items that are appropriate and relevant to the recruiter job.

Your task will involve two related activities. First, you will read situations and evaluate the extent to which each situation meets the criteria for a good situation. Second, you will write a response, that is, you will write a description of how you would handle the situation. You will be given a booklet containing some situations and will work independently to accomplish both parts of today's task.

The first thing we would like you to do is to review each situation. We need your input on the extent to which the situations meet the following criteria:

- The situation is **realistic**.
- The situation is **important**. A person's response in the situation will impact one or more important work-related outcomes.
- The situation provides **enough relevant information** to help candidates choose between possible actions.
- The situation uses **correct terminology**.
- The situation is **challenging**. It is difficult enough that the correct response is not obvious to less experienced recruiters.

Please note any comments, suggestions, or changes to each situation directly on your booklet.

After you review the situation, the second thing we would like you to do is write a response for the situation. Put yourself in the position of the person in that situation. What would you do in order to deal effectively with the problem that is presented?

Your response should be realistic and should describe your actions in sufficient detail to make it clear why it is effective. Although we expect that most responses can be explained in two to three sentences, feel free to write longer responses if necessary.

Responses should meet the following criteria:

- The response can be **communicated in just a few sentences**.
- The response **provides enough information** to describe the action you would take.

We are interested in developing a large number of useful, work-related situations and responses that meet the criteria listed above. We are less concerned that you use perfect grammar or an elegant writing style.

Your participation in this workshop is greatly appreciated, and the information you provide is critical to the development of the *Situational Judgment Test*. The information you provide will remain completely confidential. Thank you for your input.

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## Appendix F — Situational Judgment Test Response Option Rating Workshop Instructions

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# ARMY RECRUITER SITUATIONAL JUDGMENT TEST

## *Response Option Rating Workshop Instructions*

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### BACKGROUND

Personnel Decisions Research Institutes, Inc. (PDRI) was tasked by the Army to develop a *Situational Judgment Test* to use as part of the Army Recruiting and Retention School. As new Soldiers, you will help us develop this test. We understand that most of you have no experience as recruiters; however, we still need your help to develop this test and understand how novice recruiters might answer these questions.

*Situational Judgment Tests* present written descriptions of realistic and challenging work situations that are similar to situations that recruiters might encounter on the job. After reading each situation and the response options, recruiter students are asked to indicate which response option would be best in each situation.

Below are two examples of Situational Judgment Test items.

#### Example Item 1

You and another recruiter from your station are jointly responsible for coordinating a recruiting presentation to a local high school. This other recruiter is not carrying his/her share of the responsibilities. What should you do?

- a. Discuss the situation with your station commander and ask your station commander to take it up with the other recruiter.
- b. Remind the other recruiter that you need help and that the project won't be completed effectively without a full team effort from both of you.
- c. Tell the other recruiter that he/she is not doing a fair share of the work, that you will not do it all yourself, and that if he/she doesn't start doing more, you'll be forced to take the matter to the station commander.
- d. Try to find out why the other recruiter is not doing his/her share and explain that this creates more work for you and makes it harder to finish the project.
- g. Get another recruiter to help with the project.

#### Example Item 2

A parent calls to complain about the program his child has been assigned to as a new recruit. You've explained the different programs and the eligibility requirements, but the parent is having trouble understanding them and is getting upset with you. What should you do?

- a. Ask the parent to come to the office to discuss the programs. Patiently go over the programs and eligibility requirements step by step.
- b. Give the parent a detailed explanation of the assignment process. Then go over the programs and eligibility requirements again.
- c. Tell the parent to calm down and ask if he would like to call back later.
- d. Ask the parent to have the new recruit explain the programs.



## Purpose of Today's Workshop

The purpose of today's workshop is to establish the effectiveness of each response option for each situation. You will be given a booklet that contains descriptions of situations that Army recruiters might encounter on the job. Each situation is followed by a list of possible responses that a person could choose to handle that situation.

For each item, begin by carefully reading the description of the situation. Think about what the most effective response would be in that situation. Then read each of the possible responses listed below that situation. In the box below the item labeled *Most Effective*, write the letter of the response option that you believe is most effective. In the box below the item labeled *Least Effective*, write the letter of the response option that you believe is least effective.

Next, think about the effectiveness of *each* of the responses listed. Rate the effectiveness of each response on a scale from 1 to 7, where 1 is a very ineffective response and 7 is a very effective response. Ratings ranging from 2 to 6 would indicate intermediate levels of effectiveness. For example, if you think a response is average in its level of effectiveness, you would give it a rating of 4; if you think a response is slightly above average, you would give it rating of 5 and so on.

1	2	3	4	5	6	7
Very Ineffective	Ineffective	Somewhat Ineffective	Average	Somewhat Effective	Effective	Very Effective

We do **not** want you to rank order the effectiveness of the responses listed. Try to think about each response separately. Try not to compare the effectiveness levels of the various responses listed for a single situation with each other. For example, it's possible that all of the responses listed for a single situation are quite effective or that all are rather ineffective. Try to think about how effective each response is compared to all possible ways to handle that situation. On the left side of the page next to each response is a line. Record your effectiveness rating for each response (from 1 to 7) on that line. Refer to the rating scale at the center of this page when you make these ratings.

In summary, for each situation, first indicate which of the listed responses you believe is *Most* effective and which is *Least* effective. Once you have done this, rate the effectiveness of each of the responses listed. We understand that you may be unfamiliar with these situations and may not be sure about the effectiveness of the different responses. We are looking for your best guesses about the effectiveness of the responses. We have provided a short glossary of recruiting terms that should help you understand some of the recruiting acronyms and terms. An example of a situation which has been completed properly is shown on the next page.

1. You have a DEP who is scheduled to ship the next day to begin basic training. That evening the DEP's parent calls and informs you that the DEP is not going to ship the next day. You contact the DEP and he tells you he will not ship. What should you do?

- \_\_\_4\_\_\_ a. Explain to the DEP he made a commitment to the Army and took an oath that he would fulfill that obligation.
- \_\_\_6\_\_\_ b. Inform the Station Commander and make a personal visit to the DEP's house to talk with him and his parents to try to convince the DEP to ship.
- \_\_\_6\_\_\_ c. Listen to his objectives and try to resell him on the Army based on his dominant buying motives.
- \_\_\_2\_\_\_ d. Tell your Station Commander and let him deal with it.

Most Effective b      Least Effective d

These ratings, along with the selection of the most and least effective response options, may not agree with your own opinions concerning the effectiveness of these responses, but this example shows you *how* we would like you to complete the items.

Note that there is a number on each line and that the *most effective* and *least effective* response options are indicated in the boxes below the items. Also note that the rater has given *two* of the possible responses to this situation a rating of 6. Remember, you are not comparing these responses to each other. You may assign as many 1s as you would like, as many 4s as you would like, and so forth.

In addition, although the rater selected response option *d* as the least effective, he gave that response a rating of 2. Just because you think that a response is the least effective of those listed does not mean you need to give it a rating of 1. You may be able to think of many other responses that are less effective than the responses listed. By the same token, you do not necessarily need to give the response that you think is the most effective a rating of 7. You may be able to think of other responses that are more effective than those listed. So, for example, in some cases you may end up giving the most effective response for an item a rating of 6 or even 5. Also, notice that while two responses received the highest effectiveness rating for this example situation, (both b and c), only one response can be designated as *Most effective*. Similarly, only one response can be designated as *Least effective*.

Once again, please be sure to read through the entire item before making any ratings. Next, place the letter of the item you believe is *most effective* in the box marked *Most Effective*, and place the letter of the item you believe is *least effective* in the box marked *Least Effective*. Finally, rate the effectiveness of each of the response options using the 1 to 7 scale. Thank you for your assistance!

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## Appendix G — Situational Judgment Test Pilot Test Instructions

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# ARMY RECRUITER SITUATIONAL JUDGMENT TEST

## *Pilot Test Instructions*

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**\*\*\*\*\*Please read these instructions before beginning the test\*\*\*\*\***

The purpose of this test is to establish the effectiveness of each response option for each situation. This booklet contains descriptions of situations that Army recruiters might encounter on the job. Each situation is followed by a list of possible responses that a person could choose to handle that situation.

For each item, **begin by carefully reading the description of the situation.** Think about what the most effective response would be in that situation. Then read each of the possible responses listed below that situation. **In the box below the item labeled *Most Effective*, write the letter of the response option that you believe is most effective. In the box below the item labeled *Least Effective*, write the letter of the response option that you believe is least effective.**

Next, think about the effectiveness of *each* of the responses listed. **Then rate the effectiveness of each response on a scale from 1 to 7**, where 1 is a very ineffective response and 7 is a very effective response. Ratings ranging from 2 to 6 would indicate intermediate levels of effectiveness.

1	2	3	4	5	6	7
Very Ineffective	Ineffective	Somewhat Ineffective	Average	Somewhat Effective	Effective	Very Effective

**We do *not* want you to rank order the effectiveness of the responses listed.** Try to think about each response separately. Try not to compare the effectiveness levels of the various responses listed for a single situation with each other. For example, it's possible that all of the responses listed for a single situation are quite effective or that all are rather ineffective. Try to think about how effective each response is compared to all possible ways to handle that situation. On the left side of the page next to each response is a line. **Record your effectiveness rating** for each response (from 1 to 7) on that line. Refer to the rating scale at the center of this page when you make these ratings.

In summary, for each situation, first indicate which of the listed responses you believe is *Most* effective and which is *Least* effective. Once you have done this, rate the effectiveness of each of the responses listed. An example of a situation which has been completed properly is shown on the next page.

### Example

2. You have a DEP who is scheduled to ship the next day to begin basic training. That evening the DEP's parent calls and informs you that the DEP is not going to ship the next day. You contact the DEP and he tells you he will not ship. What should you do?

- 4 a. Explain to the DEP he made a commitment to the Army and took an oath that he would fulfill that obligation.
- 6 b. Inform the Station Commander and make a personal visit to the DEP's house to talk with him and his parents to try to convince the DEP to ship.
- 6 c. Listen to his objectives and try to resell him on the Army based on his dominant buying motives.
- 2 d. Tell your Station Commander and let him deal with it.

Most Effective b      Least Effective d

These ratings, along with the selection of the most and least effective response options, may not agree with your own opinions concerning the effectiveness of these responses, but this example shows you *how* we would like you to complete the items.

Note that there is a number on each line and that the *most effective* and *least effective* response options are indicated in the boxes below the items. Also **note that the rater has given two of the possible responses to this situation a rating of 6**. Remember, you are not comparing these responses to each other. You may assign as many 1s as you would like, as many 4s as you would like, and so forth.

In addition, although the rater selected response option *d* as the least effective, he gave that response a rating of 2. Just because you think that a response is the least effective of those listed does not mean you need to give it a rating of 1. You may be able to think of many other responses that are less effective than the responses listed. By the same token, you do not necessarily need to give the response that you think is the most effective a rating of 7. You may be able to think of other responses that are more effective than those listed. So, for example, in some cases you may end up giving the most effective response for an item a rating of 6 or even 5. Also, **notice that while two responses received the highest effectiveness rating for this example situation, (both b and c), only one response can be designated as *Most effective***. Similarly, only one response can be designated as *Least effective*.

Once again, please be sure to read through the entire item before making any ratings. Next, place the letter of the item you believe is *most effective* in the box marked *Most Effective*, and place the letter of the item you believe is *least effective* in the box marked *Least Effective*. Finally, rate the effectiveness of each of the response options using the 1 to 7 scale. Thank you for your assistance!

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## **Appendix H — In-Basket Overview**

# In-Basket Exercise Leader's Guide

## **In-Basket Leader's Guide Overview**

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### **In-Basket Exercise Overview**

*The in-basket exercise is designed to provide students with an opportunity to better understand the skills and abilities needed for success as an Army recruiter. To do this, students are presented with a set of materials similar to those that an actual recruiter would find in his/her "in-basket". They are then asked to review these materials and respond to each item as if he/she was actually "on the job".*

*Although the exercise mainly focuses on administrative, scheduling issues, it also deals with issues related to making sound decisions, getting along with fellow recruiters, dealing with the public, and responding to sensitive situations in a tactful fashion.*

*After the exercise, students "self-score" their in-baskets during a post exercise debrief meeting. Results from the evaluation are not formally recorded, but students are asked to identify some of their strengths and weaknesses and discuss effective and ineffective methods for handling each issue during the debrief meeting.*

*The following materials serve as a manual for the in-basket exercise.*

### **Leader's Guide Contents**

- |   |
|---|
| <ol style="list-style-type: none"><li>1. In-Basket Administration Instructions</li><li>2. In-Basket Exercise</li><li>3. In-Basket Debrief Meeting Instructions</li><li>4. In-Basket Self Assessment</li></ol> |
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## **Appendix I — In-Basket Administrator Instructions**

**In-Basket Leader's Guide**  
**Administration Instructions**

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## **Instructions**

*To start out, provide the students with a brief introduction to the exercise. In your introduction, you should talk about what an in-basket is and discuss why they are doing it. Be sure to mention how this exercise is for developmental purposes only, but at the same time, motivate them to take it seriously.*

What we're here to do today is what we call an "in-basket" exercise. This exercise is similar to the role play exercises you have been conducting in that you will again be playing the role of an Army recruiter. However, for this exercise, instead of engaging in a face-to-face interaction, you will be asked to respond to a variety of written materials. To do this, we are going to present you with a set of materials similar to those that an actual recruiter would find in his/her "in-basket" when coming to work on a typical morning. Thus, there will be letters, assignments, requests, notes, etc., for you to read. You will be asked to review these materials and respond to each item in a manner you feel most appropriate.

The main objective of this exercise is to give you a sense of what it is like to be a recruiter...and help you understand some of the day-to-day demands and pressures placed on recruiters. In light of this, the in-basket is viewed as a "development-only" simulation. Results from it will not be formally recorded or used for any administrative decisions. However, we ask that you take this seriously as we feel it is a good way to prepare you for your upcoming recruiter position.

## **Instructions Packet**

*After you are done introducing the exercise, pass out the instructions portion of the in-basket (this is a six page section at the beginning of the in-basket that is stapled). Give them approximately 15 minutes to review these materials.*

What I'm going to do now is give you a few minutes to familiarize yourself with your "role" and provide you

## **In-Basket Leader's Guide Administration Instructions**

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### **In-basket Items**

with some more specific instructions related to the in-basket simulation. Then, in approximately 15 minutes, I will pass out the actual letters and memos you will be asked to respond to. Any questions?

*When you return after 15 minutes, ask them if they have any questions and refer them to information in the instructions packet as necessary to clarify the situation for them. Do not make up additional information to respond to their questions. After they have had a chance to ask questions, it is time to pass out the actual in-basket items.*

Here are the in-basket memos and letters. You will have one hour to respond to these items. Whatever action you decide to take, be sure to document it in some way. To do this, we ask that you write on the items themselves...feel free to use the back of the paper if you run out of room on the front. If you would make a telephone call in response to an item, simply write down who you would call, when, and what you would cover in the conversation. You may not assume how the other person would respond.

After the exercise, everyone will participate in a debrief meeting where we will evaluate your performance and talk about effective and ineffective ways to handle each item. Again, you will have up to one and a half hours to complete this exercise. Any questions?

*Pass out the in-basket items to each participant and make a note of the time. Calculate when their hour will be up.*

*After the hour is up, collect their in-baskets (unless the debrief meeting is immediately following the administration portion of the exercise). When collecting their in-baskets, make sure that they have their names clearly marked on the front page so they can be returned for the debrief meeting.*

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## **Appendix J – In-Basket Exercise**

### **In-Basket Instructions**

In this exercise we ask you to play the role of SSG Pat Siebert - an Army recruiter based in Columbia, Ohio. We are going to present you with a set of materials similar to those that an actual recruiter would find in his/her in-basket when coming to work on a typical morning. Thus, there will be letters, assignments, notes, etc. for you to read. You will be asked to review these materials and respond to each item in a manner you feel most appropriate.

When responding to items, your response should be an explanation of what action you plan to take for each issue. As an example, let's assume you come across a letter from an angry mother. The mother is upset because you talked to her son about an Army career without first consulting her. Also, suppose the young person was qualified for the Army and had previously written an e-mail to you asking you to come visit him. This situation presents a dilemma--you have a potential recruit for the Army that you do not want to lose, but the more you pursue him, the more upset his mother may become. As a recruiter, how would you handle this? You may choose to ignore the letter and keep talking to the young person. Or, you may ask the mother to come in to the office with him so you can explain Army benefits to both at the same time. The action that you, as a recruiter, would take is what we are interested in seeing.

There are no right or wrong answers in this exercise. However, some responses are probably more appropriate and effective than others. In this exercise, do your best to meet two main recruiter goals:

1. To enlist as many persons as possible into the Army. A good recruiter tries hard to never let a prospect get away.
2. To build good community relations so that young people and other community members develop over time a favorable attitude toward the Army. This will encourage more persons to explore Army careers, which in turn will help you gain enlistments.

When discussing the angry mother letter a moment ago, we mentioned two out of the many possible responses to that letter. One was to ignore it, the other to invite her to come with her son to talk about Army careers. Note how the second of these is more likely to lead to an enlistment. After all, if you get the mother involved, you may convince her of Army benefits and she will help sell her son. There may be even better responses than this one. We ask you to use your judgment in coming up with responses that will help meet recruiting goals. Keep those goals in mind throughout this exercise, and they will help you to do well.

## In-Basket Exercise

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Just as in any exercise, there are some rules to follow in making your responses. To do well in the exercise, it is extremely important that your responses be made according to these guidelines:

1. Make all your responses on the item itself. If there is, say, a letter in your in-basket, write on the letter what you would do about it.
2. Make your responses specific. They should include at least two pieces of information:
  - a. what you intend to do. Don't simply tell us, "I'll write a note". Go on to summarize what you would say in the note, who you would write it to, etc.
  - b. when you intend to do it. A busy recruiter must arrange his/her schedule so that the most important things are attended to first. This is something you must also do in this exercise, so indicate when you will take action on each item.
3. Keep in mind that some items are related. As you are going through the in-basket, recognize that many of the items are related to the same issue or problem. When this is the case, it may be helpful to group the related items together and respond to the issue as a whole, rather than respond to each item separately.

Let's consider an example in-basket item:

E-Mail Note

SGT Davis--

I have five interviews lined up today and can only handle 3 before I must attend to personal business. Can you help me?

SSG Smith

## In-Basket Exercise

---

Here is an example of an ineffective response, the kind we do not want.

### E-Mail Note

SGT Davis--

I have five interviews lined up today and can only handle 3 before I must attend to personal business. Can you help me?

SSG Smith

SSG Smith-- I'll help you. SGT Davis

Why is this ineffective? It doesn't tell what Fred plans to do or when he plans to do it. The following is an example of a good and more complete response, the kind we do want.

### E-Mail Note

SGT Davis--

I have five interviews lined up today and can only handle 3 before I must attend to personal business. Can you help me?

SSG Smith

SSG Smith- - I can't handle the interviews, but I'll call this morning and reschedule two of them for you. Let me know which you want changed and what you want them to do. SGT Davis

Other actions may have been more appropriate (this is for you to decide). But this example shows how specific and complete these responses should be.

Are there any questions so far?

We said earlier that you will play the role of a recruiter in this exercise. We will now present that role. Get familiar with the role now, although you can look back at this description during the exercise.

## In-Basket Exercise

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You are SGT Pat Siebert, an Army recruiter in a four-person recruiting station in Columbia, Ohio. The Columbia Recruiting Station services a moderately large city which recruits men and women from the city and the outlying rural area. The staff of your station consists of:

1. SSG Pat Siebert - yourself
2. SSG Sam Stevens - Recruiter
3. SGT Mark Moline - Recruiter
4. SFC Frank Messinger - Station Commander

Your station has found it quite difficult to enlist qualified recruits during the last few months. This makes it especially important to concentrate on following up on anyone who appears interested in the Army.

Today is Tuesday, February 27. It is 0730. You are scheduled to leave for Cleveland at the end of the day today to attend a three-day Recruiter Practices Program. You are planning to return from Cleveland on Friday, March 2, though you may decide to stay over an extra day if the program runs too late on Friday. You will not be in the office again until Monday, March 5. Additionally, your Station Commander, SFC Messinger, will not be in the office for the rest of the day as he is scheduled to attend a training seminar from 0830 to 1800. Thus, any decisions you make today...must be made without the help of your Station Commander.

Below is your schedule for the day. In the morning, you are slated to be in Lakefield (about a 30 minute drive from the station). In Lakefield, you are interviewing a potential recruit at 0900, and then some prospecting at the local high school from 1000 to 1200. Then, you drive over to Pillager (about 20 minutes from Lakefield). In Pillager, you are scheduled to meet with a potential recruit - Jeff Ericksen. After meeting with Jeff, you are to go to Pillager High School to pick up a transcript for a recruit (Lisa Hagen) who is signing up for the delayed entry program next week. Finally, you are scheduled to go to Oakwood to run a police check on Todd Dent (a student who is in the process of deciding to join) and then attend the Oakwood High School track meet. You'll go from the track meet to the airport...you need to be at the airport by 1800 to catch your flight to Cleveland. Attached is a map of your recruiting zone to give you a better sense of your travel for the day.

### Schedule for Today

0800 Office/Travel

0900 Interview (Scott Kubin) in Lakefield

1000 Prospecting at Lakefield High School

1100 Prospecting at LHS

1200 Prospecting at LHS

1300 Interview with Jeff Ericksen in Pillager

1400 Pick up transcript for Lisa Hagen at Pillager High School



## In-Basket Exercise

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1500 Police check (Todd Dent) in Oakwood

1600 Oakwood High track meet

1700 Track meet

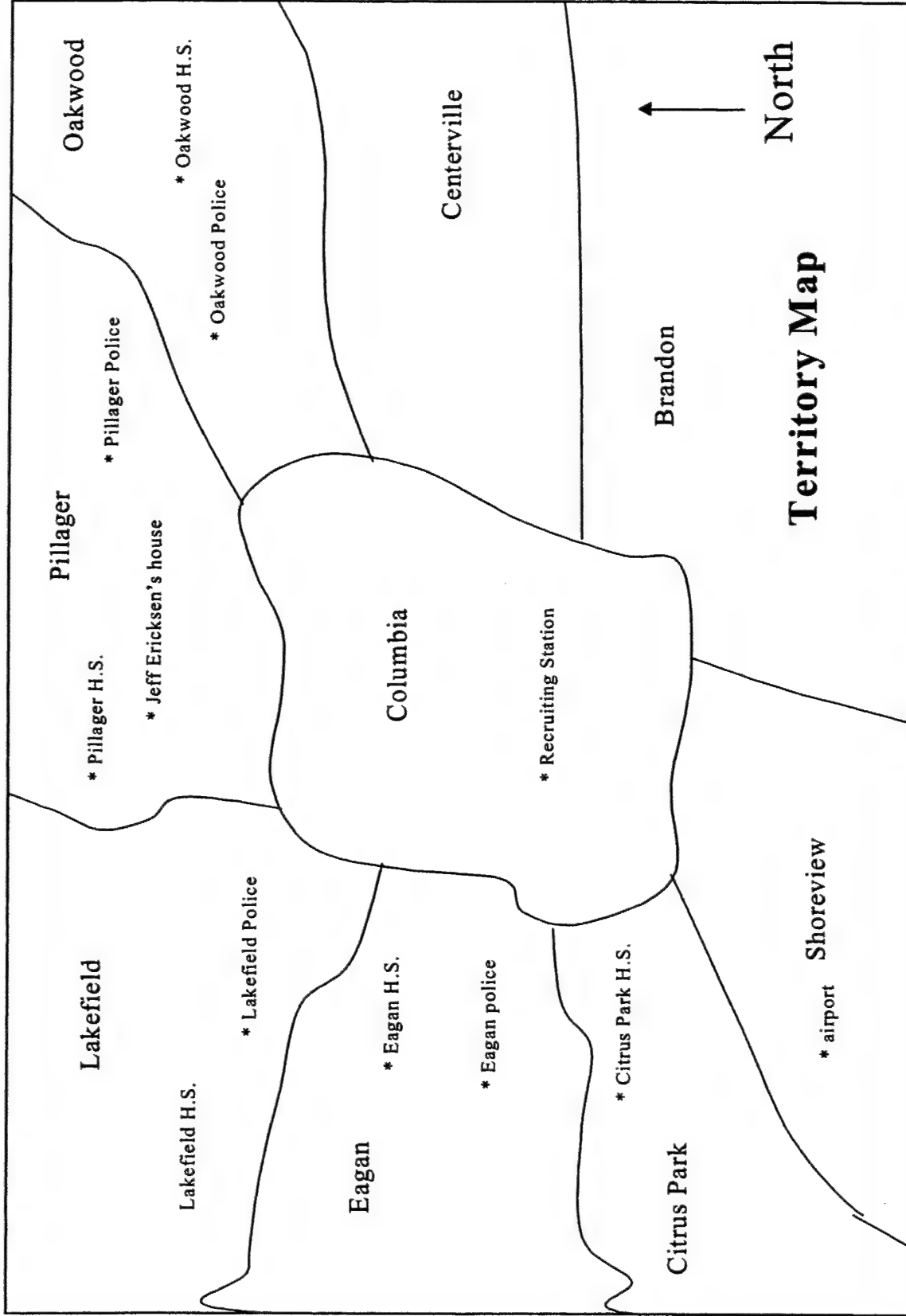
1800 airport

You have just stopped at the office to review your in-basket (the materials you will receive in a moment) and finalize your plans for the day. You must leave for your first appointment in 45 minutes. Thus, you will have no more than 45 minutes to record your actions on the in-basket items. This 45 minutes will begin when you receive the items. It is important to review everything in your in-basket, because you will be away from the station until Monday and you do not wish to lose any recruits.

To summarize, first read all the items in your in-basket before taking action. Decide which items require your immediate attention. Take whatever action you think is appropriate. Write down every action you would take, including notes to other recruiters in the station and to yourself. Record your responses directly on the note, e-mail, letter, etc. to which you are responding. As explained previously, your responses should contain more than just a "yes" or "no", for example-- if you plan to phone someone, state who you are calling and what you plan to discuss, or if you respond to a request by another recruiter explain what action you plan to take and why. Provide as much detail as you think necessary. Try to respond to all items in the in-basket exercise. Included in the in-basket materials is a calendar to help you keep track of dates. You may refer to this situation description throughout the in-basket exercise.

Be sure you play the role outlined above. Remember:

1. You are SSG PAT SIEBERT, a recruiter in Columbia, Ohio.
2. SSG Sam Stevens and SGT Mark Moline are the other two recruiters at your station. SFC Frank Messenger is the Station Commander.
3. It is 0730, and you must leave to go to your first appointment in 45 minutes. You must be at the airport by 1800 to catch a flight to Cleveland.
4. Your Station Commander, SFC Messenger, will be unavailable for contact throughout the day.



In-Basket Exercise

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INTRA-OFFICE PHONE MESSAGE

TO: SSG Siebert

FROM: SGT Moline

Jeff Ericksen called at about 7:15 this morning. He asked me to tell you that he won't be able to make your meeting this afternoon at 1300. Apparently he got called into work to pick up a shift for one of his co-workers who is sick. He said he'll call back to re-schedule.

INTRA-OFFICE MEMORANDUM

CONFIDENTIAL

TO: SSG Siebert  
FROM: SFC Messinger

I've placed in your in-basket an announcement from Edgar Senior High School. Read it and tell me if you would be interested in being the Army representative at these festivities. I know that you will make every effort to represent the Army honestly to these students.

SSG Stevens was responsible for a Career Day booth at a neighborhood high school last year. I was very disappointed in the results. He chose to show a film of night life in foreign cities and included only high school seniors in his presentation. Very few students were turned on by his approach. In fact, students later reported that they had learned nothing about the Army from SSG Stevens.

We can't let that happened again this year; that's why I'm asking you to take over. Please give me your answer immediately. If you decide to take over, I'll let you handle all the details.

Thank you.

In-Basket Exercise

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INTRA-OFFICE PHONE MESSAGE

TO: SSG Siebert

FROM: SSG Stevens

The principal of Citrus Park High School, Harold Nelson, called around 0700. A Navy recruiter was scheduled to come into the high school for prospecting from 1300 to 1500. For some reason, he had to cancel the appointment at the last minute. Harold was wondering if you would want to take that slot this afternoon. I told him you would get back to him as soon as you get in. Hopefully you'll be able to fit that into your schedule...I know you've been trying to get into that high school for quite a while now.

In-Basket Exercise

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INTRA-OFFICE MEMORANDUM

TO: SSG Siebert

FROM: SFC Messinger

Due to his schedule, SGT Moline will not be able to make this interview. Could you take care of this for him? Here are his notes from his initial discussion with Julie Reynolds.

As you know, I'll be out of the office all day today, but could you please leave a copy of your schedule for today so I can take a look at it when I get back?

---

NOTES ON JULIE REYNOLDS

Talked to Julie Reynolds on the phone February 20th. She mentioned how she is considering joining the Army. She wants to go to college, but doesn't think she'd be able to afford it. We set-up a meeting (at her house) at 1500 February 27<sup>th</sup>. She lives on Lexington Ave 5 blocks south of Citrus Park High School. Her address is 1255 Lexington Ave S.

[illegible]

## In-Basket Exercise

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TO: SSG Siebert

FROM: SSG Stevens

I just heard through the grapevine that a Career Day will be held at Edgar Senior High on March 9. I directed a similar project about a year ago and if it's okay with Frank, we can use some of the same ideas at Edgar Senior High. Here are just a few suggestions which seemed to go over big at another High School Career Day.

- Show a film of the exciting night life that awaits recruits in foreign countries such as Germany and Korea.
- Provide a very general description of Army benefits. A discussion of the specific programs will only confuse students.
- Restrict our group discussion period to seniors only. It is a waste of time to include juniors and sophomores.

What do you think SSG Siebert?



In-Basket Exercise

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Greg Smith  
12306 50<sup>th</sup> Street  
Oakwood, OH

Dear Recruiter,

My son, Mike Smith, will be graduating from high school this spring. As of now, he has no plans for school next fall. He has been talking about starting up a landscape business with his friends once he's graduated from high school. I really don't think this is a good idea. I think he should join the Army, as I did after I graduated from high school. I'm wondering if you are available to meet with me sometime tomorrow (February 28<sup>th</sup>) to discuss how we might get him interested in the Army. Let me know.

Sincerely,

Greg Smith

## In-Basket Exercise

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Dacron Youth Club

Dacron, Ohio.

Dear SGT Siebert:

Our Dacron Youth Club is a group that was founded about a year ago with the intention of providing young boys and girls with a source of help in making plans for their lives. Part of our efforts in that area are directed toward helping them make career decisions.

Our town is about 40 miles away from your office (about 15 miles north of Oakwood) and thus, we rarely are exposed to the benefits of military careers. Could you possibly come to one of our meetings to talk to us about military careers? We are hoping you could talk to us on Saturday, March 17<sup>th</sup>. I'm sorry about the short notice.

Please let us know if you could make the date we have planned for you.

Sincerely,

Marla Hollandsworth, Director

In-Basket Exercise

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TO: SSG Siebert  
FROM: SFC Messinger  
SUBJECT: Applicant Cancellations

Two of your applicants from Eagan High School who are supposed to DEP-in tomorrow have just advised me they no longer wish to join the Army! I don't know why this happened, but take care of it at once!

Ray Collier 442-2788

Mike Rice 443-8711

Fred Neal and John Sauer were also to DEP-in tomorrow, as they are part of this group enlistment with the two above. What about them?

## In-Basket Exercise

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TO: SSG Siebert  
FROM: SFC Messinger  
SUBJECT: New Recruiter SGT Doug Moss

A new recruiter, SGT Doug Moss, will be joining our station next week. I'd like to have you be his official mentor. Do you have any ideas on how you can help SGT Moss' transition to the job be a smooth one? Maybe you could fit him into your recruiting schedule next week.

## In-Basket Exercise

---

TO: SSG Siebert  
FROM: SGT Moline  
SUBJECT: Rejected Applicant Larry Tyson

While in a store this morning, I heard Larry Tyson talking to some other boys, and it was obvious that he was upset about being rejected because he was overweight. He was telling the others that you lied to him and his friends about the Army qualifications and benefits. He apparently thinks you arranged the group enlistment while knowing all the time that he (Tyson) would be rejected. I'm afraid he's really turning people off on the Army and especially you as a recruiter.

I figured since you processed his application, you might be interested. I know that Eagan High School has been an excellent source for recruits, we don't want to jeopardize that. It might help if you go to the high school and meet with everyone. I know that Larry and his buddies eat lunch in the school cafeteria at 1130 and then work out in the school gym from 1530 until 1700 every weekday.

CENTRAL RECRUITING OFFICE MEMO

TO: SSG Pat Siebert

Your supervisor has contacted us to request statistics on recruiting from the first two months of this year. We will be forwarding these to you in mid-April.

SSG Siebert:

Mr. and Mrs. Schilling called me earlier today to tell me how upset and depressed their son, Matthew, was to find out that he did not qualify for the Army Avionics program. Although he had not yet enlisted, he took the ASVAB at school and found out that his score was too low to qualify for the Avionics program. The Schillings said that Matthew was no longer interested in joining any Army program. Matthew is apparently so upset that he has even given up his job at the car mechanic shop. I know that you have spent some time recruiting him, so I'll let you handle this.

SFC Messinger

## In-Basket Exercise

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TO: SSG Siebert  
FROM: SFC Messinger  
SUBJECT: Recruiting Strategy for April

I would like you to prepare a report to us on possible areas of heavy recruiting emphasis for your zone in April. The report must be completed by April 1 or it will be useless to us.

To complete the report, you will need to examine recruiting statistics for the first two months of this year. I have already contacted the Battalion office and requested that they send you the necessary materials. They should get in touch with you soon on this. Make sure they get the materials to you on time.



## In-Basket Exercise

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Jeff Fruend  
2201 South Irvine  
Dacron, Ohio

Dear Recruiter,

I am 19, have finished high school, and I'm currently working on my father's farm. I saw a TV commercial about the Army yesterday, and I'd like some more information about it.

My problem is I can't get in to your office, as I live quite a distance away (about six miles south of Dacron) and I have no car. Before I make any decision about joining the Army, I would like to read some literature about the Army and its training programs. Also I really want to talk to someone who knows a great deal about the Army programs. I'd be able to meet anytime after February 28<sup>th</sup> (I work all day the 27<sup>th</sup> and a Navy recruiter is stopping by to talk with me on the 28<sup>th</sup>). I would appreciate anything you can do for me.

Thank you.

Sincerely,

Jeff Fruend

TO ALL MILITARY RECRUITING STATIONS

ANNOUNCEMENT

Edgar Senior High is planning a Career Day entitled, "A Look to the Future" on Friday, March 9. We invite you to participate in this educational program designed to inform our students of the military careers available to them.

This program will be a good opportunity for the students and staff to get acquainted with you. Please join us on Friday, March 9.

Due to space and time constraints, we need to know at least one week in advance (Friday, March 2) whether or not you are interested in participating. The school guidance counselor, Allen Miles, has all the necessary information (Phone 528-3438). We hope to see you Friday, March 9.

## In-Basket Exercise

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TO: SSG Siebert

FROM: SGT Moline

Sidney Dobbins called this morning to check on the status of his enlistment application. I found his application forms on your desk and everything seems to be in order. I just need your okay to start the wheels turning to finalize Dobbins' enlistment. I know you've been recruiting him for quite some time so I'm sure you'll want to get everything finalized as soon as possible.

BATTALION RECRUITING OFFICE  
1205 ARMY SERVICES BLDG.  
COLUMBUS, OH

TO: SSG Siebert

The following four applications have successfully passed their physical and mental examinations:

Fred Neal

John Sauer

Ray Collier

Mike Rice

The Army will, as requested, assign these four applicants to the same basic training camp and same initial duty. The assignments will be made once we have received each recruit's processing forms.

Also note a fifth applicant, Larry Tyson, (who sought admission with the above group) has been rejected. Tyson failed his physical examination because his weight exceeded that allowable for entering the Army.

INTRA - OFFICE MEMORANDUM

TO: SSG Siebert

FROM: SGT Moline

SSG Siebert, remember that guy named Peter Trucano...the one who wasn't able to join the Army because of his asthma. Well, it looks like the Brandon recruiting station has signed him up and enlisted him for duty. What do you think we should do?

In-Basket Exercise

---

INTRA-OFFICE MEMORANDUM

TO: SSG Siebert

FROM: SSG Stevens

I heard some information about Sydney Dobbins that you probably want to look into. While at the Citrus Park High School soccer game yesterday, I overheard some of Sydney's friends talking about how Sydney spent a night in the Citrus Park jail a couple days ago. I'm not sure what happened, but I thought you should know about it....especially since you conducted his police check last week...before any of this happened.

In-Basket Exercise

<i>Sun</i>	<i>Mon</i>	<i>Tue</i>	<i>Wed</i>	<i>Thu</i>	<i>Fri</i>	<i>Sat</i>
<b>Feb 25</b>	<b>Feb 26</b>	<b>Feb 27</b>	<b>Feb 28</b>	<b>1</b>	<b>2</b>	<b>3</b>
<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
<b>11</b>	<b>12</b>	<b>13</b>	<b>14</b>	<b>15</b>	<b>16</b>	<b>17</b>
<b>18</b>	<b>19</b>	<b>20</b>	<b>21</b>	<b>22</b>	<b>23</b>	<b>24</b>
<b>25</b>	<b>26</b>	<b>27</b>	<b>28</b>	<b>29</b>	<b>30</b>	<b>31</b>

**March**

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## **Appendix K — In-Basket Exercise Facilitator's Guide**



## **In-Basket Leader's Guide Debrief Meeting Instructions**

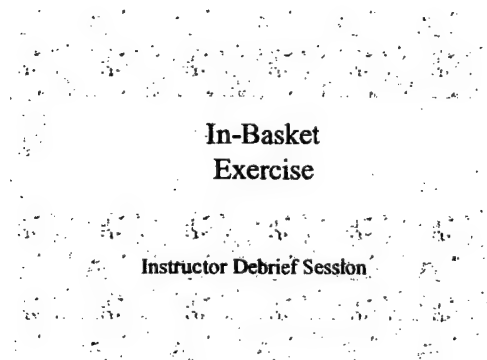
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### **Debrief Meeting Overview**

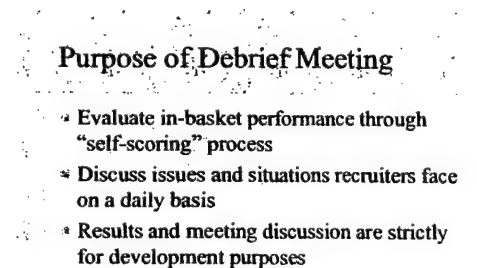
*After the students have completed the in-basket exercise, instructors will lead a one hour debrief meeting. The purpose of this meeting is to help students evaluate their performance on the in-basket exercise and give them a sense of some of the day-to-day issues recruiters routinely face.*

*It is important to keep in mind that this exercise is viewed as a DEVELOPMENTAL simulation. Results from it will not be used to make administrative decisions, but rather, they will be used to help students gain insight into their strengths and weaknesses and give them a realistic preview of the recruiter position. Because of this, instructors should strive to create as much of a non-threatening, facilitative environment as possible. The following is a step by step guide for leading this facilitation meeting.*

### **Introduction**



*At this point, welcome everyone and introduce yourself (if the students do not already know you).*



## **In-Basket Leader's Guide Debrief Meeting Instructions**

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*Start out the session by communicating the purpose of the meeting and the agenda for the next hour.*

What we're here to do now is to go over the in-basket you recently completed. This exercise is somewhat different from the other exercises you have completed during your time at the school. Here, instead of having instructors evaluate your performance, we are going to have each of you "self-score" your in-basket. So, we're going to go through the in-basket as a group, and have each of you evaluate your responses based on what we talk about in the meeting. Hopefully, by doing this, you will be able to learn about some of the effective and ineffective ways to handle each in-basket item...and, give you a sense of what it is like to be a recruiter...as we will be talking about situations you are likely to face on a day to day basis.

As we're going through this session, I want everyone to keep in mind that this is purely for DEVELOPMENTAL purposes...the main reason we are here is to help you gauge some of your strengths and weaknesses as a recruiter, and give you a "realistic preview" of the recruiter position. In fact, your results will not be seen by anyone but you. So, I want people to feel free to speak openly and honestly about what they did in the exercise so that we can all learn from each other.



### **Meeting Format**

- Present each issue from in-basket
- Discuss potential actions - both effective and ineffective
- Solicit feedback from participants

## **In-Basket Leader's Guide Debrief Meeting Instructions**

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*After you have discussed the purpose, say a couple words about the format for the meeting. Let them know that you will discuss each issue that was presented in the in-basket...and that you intend to discuss effective and ineffective ways to handle each issue by having an open-ended discussion with the participants.*

With that in mind, over the course of the next hour and a half, I plan to walk through each issue presented in the in-basket. As we do this, I will 1) describe the situation and talk about the issue at hand, 2) discuss things that should be considered while addressing each issue, and 3) talk about possible actions to take...both effective and ineffective.

Before we start, I'd like to emphasize the fact that this is designed to be a participative meeting. So, as we discuss each issue, I want you to share your input and ideas as we move forward.

*After the introduction is completed, ask students if they have any questions or comments. Then, have people take out their in-baskets. To start the session, ask the students for their general thoughts on the exercise.*



### **General Impressions**

- Was it easy?
- Was it difficult?
- ✕ Were there issues that came up that surprised you?

Before we get into the details of the exercise, I'd like to get your general thoughts about the in-basket...was it easy? Was it difficult? Were there issues that came up that surprised you?

## **In-Basket Leader's Guide Debrief Meeting Instructions**

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*The purpose of this is to get them talking and help them recall what the in-basket was like. Don't take too much time doing this...you don't want them to spend the entire session complaining...but at the same time, encourage people to be open and frank. Also, at this point, you don't want people to go into specific details. You just want them to discuss their general impressions.*

*As they are talking about their general impressions, do what you can to reinforce the fact that this exercise was designed to simulate what it is like on the job. Let them know that this is a realistic job preview. Below are some things you might say to do this.*

Things are fast paced, there are time pressures, there are many different types of issues that must be dealt with...some are high priority, some are low priority...some are administrative details, some are interpersonal conflicts. Although this in-basket may be a bit of an exaggerated example of the day-to-day activities of a recruiter...the point is...the job you are about to take on has many different things all going on at the same time.

### **In-Basket Items**

*Once you've talked about people's general impressions, it is time to discuss the specific items from the in-basket. Before you do that, describe how many of the items grouped together and that the discussion will revolve around these "issues" rather than each individual item.*

O.K., now it's time to discuss the specific items from the in-basket. When discussing these items, we're not going to go through each individual item one at a time, in the order in which they were presented. But rather, we'll deal with each ISSUE. As you may have noticed, many of the items presented in the in-basket grouped together. For example, there were several memos that dealt with a rejected applicant and his friends, several memos that dealt with the high school career day presentation. The point is...items grouped together. So, as you went through the in-basket, the best thing

## In-Basket Leader's Guide

### Debrief Meeting Instructions

---

to do was to first read through all the items and recognize which items were related. This strategy not only allows you to boil the items down into a more manageable number, but it helps you to more thoroughly understand the situation and the various perspectives involved in the situation.



#### Schedule for the Day

8:00 Office/Trend  
9:00 Interview (Event Kubak) in Lakefield  
10:00 Prospecting at Lakefield High School  
11:00 Prospecting at LHS  
12:00 Prospecting at LHS  
13:00 Interview with Jeff Erickson in Pillager  
14:00 Pick up transcript for Lisa Rogers at Pillager High School  
15:00 Police check (Todd Davis) in Oakwood  
16:00 Oakwood High track meet  
17:00 Track meet  
18:00 Airport

The first issue I'd like to talk about is your schedule for the upcoming day. As the instructions indicate, your schedule for the day is quite booked, you start out with an interview in Lakefield, and end up at the airport at the end of the day. However, as you go through the in-basket, several things come up that have an immediate impact your schedule. Let's start out by discussing the most obvious changes.



#### Immediate Response Items

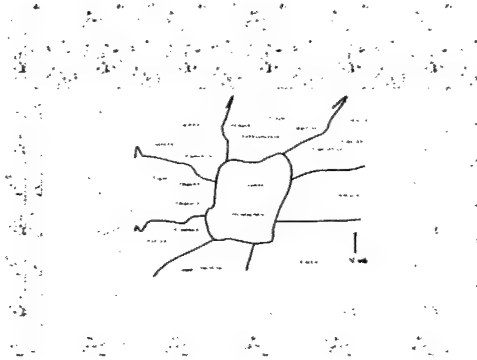
- Item #1 - Jeff Erickson cancels his 1300 appointment
- Item #3 - the principal of Citrus Park H.S. invites you to prospect at the school from 1300 to 1500.
- Item #4 - a memo from your station commander asking you to conduct an interview at 1500 today near Citrus Park H.S.

*Talk about some of the items that require an immediate response.*

## In-Basket Leader's Guide Debrief Meeting Instructions

---

Obviously, these items require immediate attention as they impact your schedule for the day. As you can see by looking at the map, you are scheduled to be in the North and Northeast part of town in the afternoon (use an overhead projector to show the map). However, with these recent developments, you are no longer able to meet with Jeff in Pillager and you have been asked to go to the Citrus Park area for a 1300 and a 1500 appointment. By agreeing to do the Citrus Park activities, it will leave you with little time to drive to Pillager to pick up Lisa Hagen's transcript, conduct a police check for Todd Dent, and go to the Oakwood track meet.



*Use the map to illustrate how Citrus Park and Oakwood are at the opposite ends of town. While talking about the schedule...it might be helpful to go back and forth between the map slide and the other slides.*

Situations like this require a recruiter to prioritize. A quick look at the activities in Pillager and Oakwood show that they are lower priority activities than the ones in Citrus Park. Prospecting in high schools...especially schools that have been previously difficult to get into...and interviewing potential recruits are very high priority activities. They should take precedence over police checks, collecting transcripts, and attending track meets. As you may have noticed, the police check was for a student who hasn't yet decided if he wants to join...and the transcript was for a recruit who is signing up for the delayed entry

## In-Basket Leader's Guide Debrief Meeting Instructions

---

program next week. So, these are activities that do not necessarily need to be done today...or, they are activities that do not necessarily require your physical presence...you could have the police department and the school either fax these documents or send them in the mail.

Thus, in this instance, the proper action would be to cancel the trip to Pillager and Oakwood, and instead, conduct the 1300 and 1500 appointments. In order to make the 1500 meeting with Julie Reynolds, you'll probably need to leave Citrus High around 1430 or 1445. This should be communicated to the principal.



### Larry Tyson and Friends

- Item #9 - SFC Messinger received applicant cancellations from 2 of the 4 confirmed eligible recruits.
- Item #11 - SGT Moline has heard Larry Tyson, the rejected applicant, discussing his negative views of the Army with some of his friends
- Item #18 - Confirms the eligibility of 4 of 5 individuals who applied to enter the Army. The 5th applicant, Larry Tyson, was rejected because he is overweight.

*Introduce the other high priority issues...Larry Tyson and his buddies...and Sidney Dobbins.*

However, these are not the only items that warrant immediate attention. There are a couple high priority issues involving students from Eagan and Citrus Park High Schools. First, we have the items related to Larry Tyson and his friends...and second, we have the items related to Sidney Dobbins. To start out, let's take a look at the issue of Larry Tyson and his friends.

*Have people look at the memos related to the Larry Tyson incident.*

Here is the situation. There are 3 in-basket items that group together. They are items 9, 11, and 18.

**In-Basket Leader's Guide**  
**Debrief Meeting Instructions**

---

So, what seems to be going on here is that the rejected applicant, Larry Tyson, appears to be discouraging his friends from joining the Army...and 2 of his friends have cancelled their applications. This is a high priority situation...something that needs to be taken care of immediately as they are scheduled to DEP-in tomorrow.

*Ask the students how they handled this situation. After they respond, you can discuss the following response.*

One possible response would be to go to Eagan H.S. after the interview in Citrus Park this afternoon talk to Larry Tyson and his friends (remember memo 12 indicates that they work out in the gym everyday until 1700. You would have some available time here assuming you cancel the Oakwood activities. However, this would require some backtracking...and additionally, you may want to handle this situation even earlier in the day. Keep in mind, because they are scheduled to DEP-in tomorrow, you need to let the appropriate people know how many people will be going in for processing. (You may want to go into some more detail about the DEP-in process...what is done...who needs to be informed, etc). One option would be to cut your prospecting at Lakefield a bit short and head to Eagan High School to catch Larry and his buddies during lunch...sometime around 1130.

*After talking about how you want to put this visit on today's schedule, you may want to have a quick discussion about how the recruiter should approach the meeting with Larry and his friends.*

Assuming you are going to meet with Larry and his friends at the high school, what would you do and what would you say at such a meeting?



## In-Basket Leader's Guide

### Debrief Meeting Instructions

---

*Have the students talk about how they would handle such a meeting. Hopefully they mention things such as..."Try to understand why the 2 applicants withdrew their applications" "Talk to Larry about his frustrations," and "Confirm the other 2 applicants are still planning on joining the Army."*



#### Sidney Dobbins

- Item #17 - SGT Moline wants to process Sidney's forms as soon as possible. Before he can do this, he needs your o.k. that everything is in order
- Item #20 - SSG Stevens indicates that Sidney spent the night in the Citrus Park jail a couple days ago...after you had already conducted a police check on him.

*After they have talked about how to handle the Larry Tyson situation, move on to the next item...Sidney Dobbins.*

In addition to the meeting with Larry and his friends at the high school, there is another high priority item that you might be able to take care of before you leave for the airport. Items 17 and 20 deal with Sidney Dobbins' application.

Here is the situation...you have an individual who is all set to join, he wants to enlist, and everything seems to be in order...except, Sidney has recently gotten into trouble. Even though the police check was fine when you ran it, you must look into the recent incident...and the sooner the better. Looking at your revised schedule, you should have time to swing by the Citrus Park Police department to investigate the issue, either before or after you visit Larry Tyson and his friends at the Citrus Park high school.

At the same time, you should write a memo to SGT Moline telling him what to do. An effective response would be to tell SGT Moline to hold the Sidney forms until further notice.

## In-Basket Leader's Guide Debrief Meeting Instructions

*After this, you could ask students if they had other responses.*



### Revised Schedule

8:00 Office/Tavel	15:00 Prospecting at C'town High School
9:30 1000/Tavel (cont.)	15:30 Prospecting (cont.)
9:00 Interview (Scott Kuhn) in Lobby/High	16:00 Prospecting (cont.)
9:30 Interview (cont.)	16:30 Prospecting (cont.)
10:00 Prospecting at Lakefield High School	16:50 Interview (John Reynolds) in C'town Park
10:30 Prospecting at LHS	17:30 Interview (cont.)
11:00 Prospecting at LHS	18:00 Interview (cont.)
11:00 (Eagan High School (Larry Tyson and friends)	18:30 Police check (Hibery Bobbins) at C'town Park
12:00 Eagan High School (cont.)	Police Dept
12:30 Travel/Lunch	17:00 Travel to Airport
	17:30 Airport

*Next, have students go to their revised schedule for the day.*

There are no doubt many different ways to make out your schedule, but based on what we've talked about, your revised schedule would look like this.

*After showing the schedule, talk about how important it is to carefully plan your schedule each day. This is really the first "take home message". Make sure the students realize the importance of this task. If you have any other anecdotes or stories that emphasize this point, go ahead and share them with the students.*

Often when you are developing your schedule, there will be tough decisions...you want to try to fit everything into your schedule, but, it's just not possible. When that happens, remember to focus on high priority activities and try to be as efficient as possible with travel.

One thing to keep in mind is that by revising the afternoon portion of the schedule, the activities that were taken off the schedule need to be dealt with. So, you should respond to Jeff Ericksen's cancellation by e-mailing him to set up an appointment when you get back from Cleveland.

## In-Basket Leader's Guide

### Debrief Meeting Instructions

---

Additionally, you should figure out a way to take care of Lisa Hagen's transcript and Todd Dent's police check. There are a variety of ways to do this. Schedule it later or ask them to fax the material, or delegate it to someone else.

*After you have talked about the schedule for the day, it is time to move on to the other items. The order in which you present these can vary, but, at some point, each issue should be discussed.*



#### Request for Meeting

- Item #7 - SSG Siebert receives a memo from a father who wants his son to join the Army. The father wants to meet with a recruiter to discuss how they might get his son interested in the Army

Let's move on to some of the other issues that were presented in the in-basket. The first issue I'd like to discuss is the memo from Greg Smith. Clearly, this is an issue that should be addressed in a timely fashion. However, it probably doesn't have as critical a time frame as some of the previous items. Thus, an appropriate action would be to get in contact with Mr. Smith to set up a meeting sometime after you get back from Cleveland. Or, another possibility would be to pass on this lead to one of the other recruiters in your station. In your response, the more enthusiasm and appreciation you show...the better. The important thing is to contact him as soon as possible and make arrangements. Additionally, it might be beneficial here to talk to the son as well, instead of relying on the father to make your sales pitch. You want to find out what his interests are so that you can focus on specific selling points. And if one of his interests is sticking

## In-Basket Leader's Guide Debrief Meeting Instructions

---

close to his buddies, they could join the meeting too and learn about Army careers.

### Upset Recruit

- Item #13 - SSG Siebert receives memo from SFC Messenger concerning Matt Schilling. Matt is upset that he did not qualify for the Army Avionics program.

Another experience that recruiters often encounter is what to do about potential recruits that do not qualify for the programs that they are interested in. An example of this is item 13. Here, Matthew Schilling wanted to be in the avionics program, but did not have the minimum scores required. It is important to come up with alternative solutions when one course of action doesn't work out. So a good response to this situation would be to still try to get Matthew into the Army, but maybe in another program that suits his skills better. The memo mentioned that Matthew worked at an auto repair shop, so maybe he would qualify for an auto mechanics program. It would be best to contact him as soon as possible (before he decides to give up on enlisting) and encourage entry into something that he could qualify for.

### Requests from Dacron

- Items #15 - a request from a youth seeking written information about the Army and its training programs.
- Item #8 - a request from the Dacron youth club to discuss careers in the Army at a March 17 meeting

## **In-Basket Leader's Guide Debrief Meeting Instructions**

---

The memo from the kid from Dacron - item 15 - brings up another important point – striking while the iron is still hot. In other words, when someone shows interest in the Army, you want to take action as soon as possible while they are still motivated and before they start thinking about other options. An example of this is item 15. Jeff Fruend saw an Army commercial and wanted more information about it. However, he is busy today and by the time you return from your trip, he will have talked to the Navy recruiter.

This leaves you with a decision – do you wait until you get back from your trip to set up a meeting, or, do you pass this lead to someone else in your station...someone who might be able to meet with Jeff before you get back. Looking at the situation, this might be an instance where you pass the lead on to another recruiter. Although you may not get individual credit for the enlistment, the whole team will benefit if this person enlists. You may be tempted to consolidate this meeting with the Dacron Youth Club visit (item 8) since they are both in the same remote location. However, the youth club visit is not until March 17<sup>th</sup>, and the potential recruit could join the Navy by then. The best thing to do is to schedule the interview as soon as possible and also notify the director of the youth club that you will see her on the 17<sup>th</sup>.



### **Edgar H.S. Career Day**

- Items #2, 6, 16 - Edgar high school is holding a career day. SFC Messinger has asked you to assume responsibility for representing the Army at this event. Further, he talks about how the methods SSG Stevens used when presenting last year were inappropriate, and that you should try something new this year. At the same time, SSG Stevens offers to help with the Career day activities and provides several "suggestions".

## **In-Basket Leader's Guide Debrief Meeting Instructions**

---

Three of the items (numbers 2, 6, and 16) addressed the Career Day at Edgar High School. This issue was a challenge because you had to decide not only how to handle the presentation itself, but also how to work effectively with others. The immediate tasks to perform are to notify your station commander and the school counselor that you will take responsibility for the presentation and then plan what approach you will take to do so. In addition, you have to decide how to negotiate with your fellow recruiter so that you can maintain a good working relationship with him without adopting his presentation format. It would be most effective here to tailor the presentation to the specific audience and their interests and also include a larger audience (not just seniors). You could speak with SSG Stevens and say that you would appreciate his input, but you want to develop a new program for your visit.



### **New Recruiter Training**

- Item #10 - SFC Messenger asks you to mentor a new recruiter. He asks you for suggestions on how to help the recruiter make a smooth transition to the job.

*The next item is the new recruiter training item. One of the main themes we want to convey from this item is that the station crew works together as a team. Crews often help each other out. The more senior recruiters often act as role models and mentors for new recruiters.*

The next item I'd like to talk about is the item where the station commander asks you to help train a new recruit. One of the first things to recognize with this item is that this request does not require an immediate response because the new recruiter will not be in for a

## **In-Basket Leader's Guide Debrief Meeting Instructions**

---

week or so. However, any suggestions or ideas at this point would be helpful.

How did everyone handle this item?

*After people have talked about how they responded to the item, talk about an effective response to this item.*

For this item, there are a couple different responses you could have. One, you could just tell SFC Messinger that you will provide some type of training, but don't talk about any specifics. Or two, you could go into some detail about how you plan to train the new recruiter. In this instance, the more specific you get in your response...the better. For example, you might suggest the recruit go with you to a prospecting appointment or an individual interview. The main point is...the more specific the plans, the better. As a recruiter, you work closely with the other recruiters in your station. Your success as a station depends on everyone working together as a team. The faster you can get everyone up to speed, the better. It takes time to learn the ropes. As a new recruiter, you'll benefit greatly from the experience and wisdom of the more senior recruiters. As a more senior recruiter, you are in a position to help the station by providing on-the-job training for new recruiters.



### **Enlistee with Asthma**

- Item #19 - A fellow recruiter notifies you that a nearby station has enlisted someone who you know to have asthma.

*The main point with this memo is that they must look into this matter.*

## In-Basket Leader's Guide Debrief Meeting Instructions

---

For this memo, you are presented with an awkward situation...however, it is a situation that you very well might find yourselves in. One of your fellow recruiters alerts you to a situation from the Brandon station...apparently they enlisted a recruit who has asthma. In situations like this, you must look into the matter. It would be unethical for you to say...well, if the Brandon station signed him...he must be fine. In many situations, recruits may hide things from recruiters to allow them to enlist. If you are aware of a situation like this, you must look into it...the safety of the recruit depends on it.



### Recruiting Strategy Report

- Items #12 and 14 - SFC Messenger asks you to prepare a report on possible areas of heavy recruiting for April. The deadline for the report is April 1st. At the same time, the Central Recruiting Office says that they won't get you the statistics for this report until mid-April.

*The main issue here is that we have a scheduling conflict. SFC Messenger wants the report April 1, but the appropriate statistics will not arrive until mid-April. SSG Siebert must resolve the conflict between these two dates.*

Items 12 and 14 relate to an assignment you have from SFC Messenger. You are to prepare a report on the recruiting strategy for your area. The first thing to recognize here is that you have a scheduling conflict. Your boss wants the report on April 1<sup>st</sup>, but the statistics needed to complete this report will not be available to you until mid-April. This presents a problem that you need to resolve. There are a couple different ways to handle this issue. First, you could try to get the central office to give you the statistics three weeks earlier. Or, you could write a memo to the station commander asking that he delay the report deadline by two weeks. The main point is that you



**In-Basket Leader's Guide**  
**Debrief Meeting Instructions**

---

need to recognize this conflict and take steps to deal with it. This is not something that needs to be totally resolved today...but, some type of steps should be taken to fix the situation.

*One of the main points from this issue is the fact that much of your job as a recruiter depends on information from others.*

*End of the in-basket.*

## **Scoring**

Well, that is it for the in-basket items. I think we've pretty much touched on all the issues I planned to talk about. Are there any points you would like to discuss?

I'd like to wrap this up by having each of you evaluate your performance on the in-basket. While evaluating your performance, I'd like you to pay particular attention to 4 different performance dimensions. These dimensions are: practical judgment, organization, empathy, and communication skills. Here is a scoring form to help you do this.

*Pass out the in-basket self-assessment forms. Display the overhead that shows the dimensions, their definitions, and examples of effective behaviors for each dimension. Read through each dimension...encourage them to ask questions if they have any.*

While looking at each of these dimensions, try to think of instances where you demonstrated effective behaviors for that dimension...and instances where you demonstrated less effective behavior. Then, give yourself an overall rating for that dimension...on a one to five point scale, with a 1 being not at all effective to a 5 being extremely effective. While assigning these ratings, try to think about your strengths and weaknesses in the exercise. For instance, maybe you did a good job recognizing the urgency of the issues and you took immediate action, however, while doing so, you failed to demonstrate much empathy or

## In-Basket Leader's Guide

### Debrief Meeting Instructions

---

interpersonal concern. From this, think about whether the strengths and weaknesses you demonstrated in the exercise are typical of your strengths and weaknesses from prior jobs. If so, this could be an area of focus for your development.



#### Practical Judgment

Able to handle problems and situations in an efficient and practical manner; likely to accomplish things in a down-to-earth, workable way.

- Developed an efficient, realistic travel schedule
- Dealt with urgent issues in a timely fashion (e.g. Larry Tyson, Sydney Dobbins, Citrus Park principal)
- Picked up on connections between items (Larry Tyson, Edgar H.S. career day, Recruiting statistics request)
- Responses demonstrated a solid understanding of the issues



#### Organization

Systematic; planful; able to arrange work efficiently; able to effectively organize own activities toward meeting objectives; effective in keeping track of detail.

- Was able to address all items in the specified amount of time
- Prioritized issues correctly
- Made appropriate notations on calendar
- Grouped related items together
- Delegated assignments if necessary
- Developed thorough plans



#### Empathy

Sensitive to others' feelings, positions, etc.; socially aware.

- Took others' feelings into consideration (e.g. Career day memo from SSG Stevens)
- Expressed personal interest and concern for others (e.g. Matt Schilling, Larry Tyson)
- Willing to help out other members of the team (Julie Reynolds interview, new recruiter)

## In-Basket Leader's Guide

### Debrief Meeting Instructions

---



#### Communication Skills

Expressed ideas in a clear, articulate fashion.

- Responses were easy to understand
- Used good grammar
- Writing appeared professional



#### Overall Performance

Overall Effectiveness in the exercise

- Made productive use of time
- Took immediate action on critical issues
- Decisions demonstrated solid grasp of the issues
- Worked as a team member (e.g. request to mentor new recruit)
- Behaved ethically (e.g. recruit with asthma)
- Dedicated to follow-thru (Sidney Dobbins, Larry Tyson and friends)
- Dealt with issues in a thorough fashion

### **In-Basket Self Assessment Form**

Rate your performance on the in-basket for each of the dimensions listed below. Use the 5-point effectiveness scale to indicate how effectively you performed on each dimension according to the given definition.

	Very Ineffective	←————→	Very Effective		
<b>PRACTICAL JUDGMENT</b> – <i>Able to handle problems and situations in an efficient and practical manner; likely to accomplish things in a down-to-earth, workable way.</i> <ul style="list-style-type: none"> <li>• Recognized conflicts in schedule (Citrus park presentation, statistics request)</li> <li>• Prioritized issues correctly (interviews more important than transcripts)</li> </ul>	1	2	3	4	5
<b>ORGANIZATION</b> – <i>Systematic; planful; able to arrange work efficiently; able to effectively organize own activities toward meeting objectives; effective in keeping track of detail.</i> <ul style="list-style-type: none"> <li>• Made appropriate notations on calendar</li> <li>• Revised schedule as needed</li> </ul>	1	2	3	4	5
<b>EMPATHY</b> – <i>Sensitive to others' feelings, positions, etc.; socially aware.</i> <ul style="list-style-type: none"> <li>• Took others into consideration (Career Day memo from Sam)</li> <li>• Showed personal interest and concern for others (Matthew Schilling, Larry Tyson)</li> </ul>	1	2	3	4	5
<b>COMMUNICATION SKILLS</b> – <i>Expressed ideas in a clear, articulate, fashion.</i> <ul style="list-style-type: none"> <li>• Finished within allotted time period</li> <li>• Responded to all issues presented</li> </ul>	1	2	3	4	5
<b>OVERALL PERFORMANCE</b> – <i>Overall effectiveness in the exercise.</i> <ul style="list-style-type: none"> <li>• Made productive use of time</li> <li>• Took immediate action on critical issues</li> <li>• Worked as a team member (request to mentor new recruiter)</li> <li>• Behaved ethically (recruit with asthma)</li> <li>• Dedicated to follow-thru (Sidney Dobbins, Eagan boys)</li> </ul>	1	2	3	4	5